

## **Work Assignment SOW**

**Work Assignment Title:** Water Reuse Funding/Financing Analysis Tool

**Contractor:** Industrial Economics, Inc.

**Contract No.:** EP-W-15-011

**Work Assignment Number:**

**4-64**

**Estimated Period of Performance:**

Date of Issuance to July 16, 2020

**Estimated Level of Effort:**

600 hours

**Work Assignment COR (WA COR):**

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**Contract Level COR (CL COR):**

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### **I. Background**

There are many existing federal programs available to support community and state efforts that meet cross-cutting public program goals, yet both communities and states often face information asymmetry and resource constraints when it comes to identifying and leveraging these resources. Inconsistencies in both the procurement and eligibilities of funding programs are often discouraging to communities seeking to perform non-traditional projects in the water space, such as reuse, conservation, and resiliency.

While there have been many attempts at the federal and state levels to create compilations of government resources and programs, most of these products consist of creations of links to other websites or tables of names of resources with little substantive context. While these products have been successful in compiling lists of existing resources, they still require a significant amount of effort on the part of state and local governments to research and navigate federal resources in order to make decisions that advance their program needs.

Improving access to a wider variety of EPA and Office of Water (OW) funding sources for water resource actions that meet multiple state and local partner interests could enable the implementation of more successful water program projects overall. For example, water quality improvements concerning stormwater treatment and capture may also provide flooding and natural hazard mitigation benefits. These multifaceted projects

broadly benefit Office of Water programs and cross cutting policy interests under both the CWA and SDWA, among other EPA programs the Agency implements.

## **II. Purpose**

EPA provides support to states and tribes for building capacity with implementing their water resource programs under the Clean Water Act and Safe Drinking Water Act, among other statutes. The purpose of this work assignment is to develop a web-based interagency federal tool to help states and communities navigate a select set of federal resources currently available for supporting resiliency work. The Tool would not only identify, compile, and connect EPA's many funding programs for states and communities, but allow them to combine funding in a way that scales up the impact of water resource projects while building partner capacity- financially, socially, and environmentally.

This interagency tool would relieve states and communities from researching the details of individual federal grant programs upfront by replacing any guesswork and underlying research with simple decision tree logic. This approach helps potential applicants define their needs and build capacity for understanding and preparing the required information across various applications. This project would also strengthen coordination across government programs to generate more streamlined, efficient operations and smarter investment of federal and state dollars.

Furthermore, this interagency tool would help meet state and local partner's interests in stronger coordination between federal funding programs and processes to help direct funding and resources for localized efforts. This project would build on existing resources and compilations to more clearly, comprehensively, and succinctly identify the variety of federal agency program resources most appropriate for their size, area, demographics, and other needs; enabling them to easily target the best opportunities. Improving understanding of financing options will enable more projects on the ground in states and communities.

## **III. Quality Assurance (QA) Requirements**

Check [ ] Yes or [ X ] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

## **General Requirements of the Work Assignment and Schedule**



Quick Response: Under this Performance Work Statement the contractor may be required to provide information for use by EPA for quick responses and analyses of options, issues, and policy decisions. Quick responses are those which require completion in one to five working days.

#### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR.

All memos, draft comments, summaries and responses, and chapters are to be provided in hard copy and in electronic form using Word and/or Excel/Access or, in special cases another software program agreed to by EPA. Memos are to be written in a manner which will make them easy to turn into draft chapters for the Final Report. For deliverables that are in Word or PDF versions of Word documents that are intended to be shared with management or the public, the contractor shall use decimal align in all tables containing columns of numbers of varying digits, whether decimal places are reported or not. All final materials, e.g., memos, chapters, etc. are to be prepared only after receiving written technical direction from the EPA WA COR. Final deliverables shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverables.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

#### **Task 1 - Prepare Workplan**

Element 1 Section 1 page(s) 4-5

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required. A weekly update call with the EPA WA COR will be required for this work assignment to discuss progress on deliverables, costs, and other potential issues.

**Deliverables and schedule under Task 1**

- 1a. Workplan within 15 calendar days of receipt of work assignment.
- 1b. Revised workplan within 10 calendar days of receipt of comments from the Contracting Officer, if required.

**Task 2 - Information Synthesis**

Element 1 Section 1 page(s) 4-5

The Contractor shall create a data framework for categorizing and aggregating federal funding opportunities. The Contractor shall engage EPA and other federal partners, as appropriate, to help define decision support matrix “criteria” and review available grant and loan funding from select federal organizations. To the extent possible, this metadata analysis shall draw from prior compilations of federal funding and financing opportunities among other existing resources that support such projects (such as the Water Finance Clearinghouse at [www.epa.gov/wfc](http://www.epa.gov/wfc)). These resources or programs should represent the most utilized, strongest contenders for integration that would scale up impact and availability of such assistance. The synthesis review, gap analyses and interviews, and database of funding opportunities will be used to develop a data framework and related decision tree to operationalize the web-based tool.

**Deliverables and schedule under Task 2 (By end of March, 2020)**

- 2a. A comprehensive database of funding resources and memo drawing conclusions from analytical efforts highlighting funding or financing opportunities that have similar targets and objectives (e.g., water reuse, resilience, adaptation, water quality protection, and so forth)
- 2.b. A spreadsheet of any funding sources, with their appropriate descriptions and metadata, that are not available in the Water Finance Clearinghouse
- 2c. A Gap Analysis and PowerPoint Briefing which describes gaps and areas of overlap to the US EPA (and potentially other federal) officials
- 2d. A facilitated intra- or inter-agency dialogue; and draft and Final Meeting Summaries that accurately flag and recap the highest priority funding or financing programs for immediate inclusion in the tool
- 2e. A “Decision Support Tree” that will form the underpinning logic of the tool

**Task 3 - Gathering**

Element 1 Section 1 page(s) 4-5

The Contractor shall deploy an iterative process to define and prioritize requirements for developing the tool. The tool is not intended to be downloaded and EPA will not collect any data that is entered into the tool by the user. The Contractor shall produce user personas and case studies to inform requirements and help manage trade off decision making in the development process. The Contractor shall meet with EPA to review findings and prioritize minimum viable product specifications. The Contractor shall also

work with EPA to draft measurable goals and objectives for the tool, as well as summarize user-derived tool requirements and design specifications by the end of Mid March 2020.

**Deliverables and schedule under Task 3 (Mid-March through May, 2020)**

- 3a. Exploratory interviews with materials and findings memo
- 3b. User personas and case studies
- 3c. Draft specifications for functionality that will be needed in order to design the tool

**Task 4 - Wireframe Development and Testing**

Element 2 Section 2.7 page(s) 7

The contractor, in coordination with EPA, shall convene and facilitate demonstration workshops and/or focus groups to "finalize" wire frame input and technical direction, confirm functional and technical specifications for tool development, and address outstanding design questions. These workshops may include various combinations of project team, development team lead, selected representative user group, EPA IT, and others. The contractor shall use this information to provide a final summary regarding user-driven requirements, to develop a final specifications document, and to provide final wireframes as blueprints for building the web-based tool. There will be 2 to 3 workshops to accomplish this and they will be held at EPA Headquarters.

**Deliverables and schedule under Task 4 (TARGET: May through June, 2020)**

- 4a. An initial wireframe for the Decision Support Tool to display content and functionality in the interface
- 4b. Demonstration workshops, as needed
- 4c. Documents conveying a final requirements summary and final wireframes

**V. SCHEDULE FOR DELIVERABLES**

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR:

<b>TASK</b>	<b>DELIVERABLE</b>	<b>FORM AND QUANTITY</b>	<b>SCHEDULE</b>
<b>Task 1:</b>	<b>1a.</b> Work Plan	Electronic document	Within <b>15</b> days of work assignment receipt.
	<b>1b.</b> Revised Work Plan, if necessary	Electronic document	Within 10 days of receiving comments from CO.
<b>Task 2</b>	<b>2a.</b> Information Synthesis	Electronic documents	March, 2020

<b>TASK</b>	<b>DELIVERABLE</b>	<b>FORM AND QUANTITY</b>	<b>SCHEDULE</b>
	<b>2b.</b> Draft Resource Specifications	Electronic documents	March, 2020
<b>Task 3</b>	<b>3a.</b> Gathering Requirements - User Centered Design	Electronic documents	Mid-March through May, 2020
<b>Task 4</b>	<b>4a..</b> Wireframe Development and Testing	Electronic documents	May through June, 2020
	<b>4b.</b> Final Wireframe and Final Requirements	Electronic documents	End of June, 2020

## **Work Assignment SOW**

### **Work Assignment Title: Agency-Wide Risk Communication Training Curriculum Development**

**Contractor: Industrial Economics, Inc.**

**Contract No.: EP-W-15-011**

**Work Assignment Number:**

**4-65**

**Estimated Period of Performance:**

**Date of Issuance to 7/16/2020**

**Estimated Level of Effort:**

**400 hours**

**Work Assignment COR (WA COR):**

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**Contract Level COR (CL COR):**

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## **I. Background**

Good risk communication is critical to work across virtually all our offices and regions, because it is fundamental to the agency's mission to protect human health and the environment. EPA's FY2021 Budget Proposal also includes a focus on risk communication especially noting the needs of improved risk communication in our outreach to communities around emerging contaminants. In addition, risk communication was identified as a major management challenge for FY2019 by EPA's OIG. EPA's established procedure to address this challenge includes the development of improved risk communication for staff.

In recent years, different parts of the agency have been using different procedures and practices to both implement risk communication and to train their staff to do so. This siloed approach has led at times to inconsistencies across the agency and at times to poor risk communications. Developing a centrally managed, modern, scientifically sound curriculum with which to train EPA staff who are frequent risk communicators will be valuable to the Agency for years to come.

## **II. Purpose**

The purpose of this work assignment is to develop an Agency-wide scientifically grounded curriculum to train a wide variety of agency staff on best-practices in risk communication. In order to build a consistent approach and to improve EPA's risk communication activities, the contractor shall develop a training curriculum that is grounded in the science of risk communication, leveraging research across the fields of social, behavioral, and management sciences. This curriculum will be targeted to a broad spectrum of EPA risk communicators across our regions and offices and across job classifications (e.g., environmental engineers/protection specialists, scientist, public affairs specialists, etc.). Curriculum development shall include evaluation planning.

Examples of work in this area may include:

- Identifying new approaches and strategies from research and practice to improve risk communication;
- Researching and cataloging best practices in risk communication and training;
- Synthesizing this research and developing a curriculum for EPA risk communication training that connects to and strengthens existing EPA processes and frameworks;
- Supporting an ongoing dialogue with researchers, practitioners, the EPA risk communication working group, and key Agency senior leaders to improve the quality and ultimate implementation of the curriculum.

### **III. Quality Assurance (QA) Requirements**

Check [ ] Yes or [ X ] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

The statement above is Not Applicable as the Contractor will not be developing environmental measurements or generating environmental data.

### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverable.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent

the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

### **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised workplan within 5 calendar days of receipt of comments from the Contracting Officer, if required.**

### **Task 2 – Research: Program coordination, accumulating evidence for curriculum, research and synthesis; Evaluation Plan: [Contract Ref. -Element 3, Sections 1-5, pages 10-13]**

The contractor shall research best practices in communication training and risk communication specifically relying on expertise from leading social, behavioral, and management science researchers and risk communication practitioners. The contractor shall synthesize this research into a coherent plan for a training program. The contractor shall develop a plan for program evaluation that goes beyond participant self-reports of satisfaction. This evaluation plan shall include recommendations for improvements of the implemented training sessions as well as for a method to evaluate the curriculum itself. The evaluation plan should be designed in such away as to allow refinement of the curriculum as-needed post-evaluation. In consultation with the WA COR, the Contractor shall provide follow up research, analysis and evaluation support to document, measure and help determine further strategic choices for the development of the risk communication training curriculum.

The contractor shall develop an evaluation plan. The evaluation plan will include a method to evaluate the curriculum for its adherence to best practices of risk communication which will be completed before the end of the project. The evaluation plan will also include a method to evaluate the training once implemented, this part of the evaluation plan will not be completed at the end of the project, but it will serve as a blue-print once the training is implemented.

Examples of possible work include:

- Documenting, analyzing and/or evaluating recommendations from research, leading scientists and practitioners, best practices, and process enhancements that can reliably demonstrate improved outcomes in risk communication training (e.g., demonstration of improved techniques, more effective learning, and better adoption of best practice into everyday use;
- Assist with and provide expertise on the available sources of best practice as well as the assessment of gaps in knowledge pertaining to risk communication tools and training; and
- Development of a comprehensive process to leverage the above resources into a coherent curriculum;

### **Deliverables and schedule under Task 2**

2a. Research and analysis products based on WA COR consultations and priorities - Within 30 days of revised work plan receipt by WA COR

2b. Evaluation plan based on WACOR consultations Within 30 days of revised work plan receipt by WA COR.

### **Task 3 – Materials Development: Module Development [Contract Ref. -Element 1, Sections 2.1-2.3, pages 5-6]**

The Contractor shall incorporate, in consultation with the WA COR, researched best practices from Task 2 into a risk communication training curriculum suitable for beta testing and evaluation. The risk communication training curriculum will be targeted to a spectrum of EPA staff (e.g., environmental scientists, engineers, public affairs specialists, etc). The contractor shall aim to make the training approximately 1.5 to 2-day training designed to be instructor-delivered in-house or, when necessary, remotely by webinar. It is anticipated that the contractor shall develop core modules on risk communication principles and methodologies to communicate and enhance evidence-based science and/or analysis to support the Agency communications and education. Additional modules shall be developed on research and approved modules, including working within the EPA communication structure and approval system to enhance agency-wide communication coordination. The final product will be beta tested with EPA staff at a date to be determined and undergo a proof of concept evaluation. The risk communication training shall include, but not be limited to, the following:

- Risk Communication Training draft curriculum (outline, construct for application/purpose, agenda, slides, etc.) in electronic form, suitable for adult learning over 1.5 to 2-day deliver time period;
- Core training module with discussion of risk communication principle and concepts, and application construct;



- Modules for the practical application of risk communication by the spectrum of end-users who support the Agency's mission and evidence-based environmental protection;
- Inclusion of other materials, graphics, examples and experiential learning methodologies which best enhance training for adult learners;
- Potential case studies (e.g., examples of excellent/poor risk communications and consequences) and/or other adult learning methods and tools;
- Inclusion of risk communication references and other resources;
- External Trainer Lists and Bios;
- Other Training Curriculum Deliverables in Consultation with the WA COR; and
- An evaluation plan for improving the beta tested delivery of the training (date to be determined).

### **Deliverables and schedule under Task 3**

3. Agendas, lesson plans, course materials and other outreach materials based on WA COR consultations and priorities which will be delivered electronically and through virtual meeting- Within 30 days of the completion of Task 2.

### **Task 4 – Evaluation and Refinement [Contract Ref. -Element 1, Sections 2.2, pages 5-6 and Section 2.6, page 7]**

The contractor, in consultation with the WA COR, shall implement the evaluation plan established in Task 2 with the goal of refining the risk communication curriculum for broad-based delivery. The contractor will use/apply the beta testing methodology outlined in the evaluation plan which may include but not be limited to the following approaches:

- Provide expert consultancy review and validation of the curriculum for adherence to proven best practices;
- Delivery beta test training to a representative panel of target audience members and collect evaluative feedback (discussion session, surveys, written edits, etc.);
- Conduct a full delivery test training, collecting evaluative feedback (discussion session, surveys, written edits, etc.) on the curriculum;
- Use alternative curriculum delivery learning options and feedback via webinars, industry training benchmarking comparisons; or
- Other options as developed in consultation with the WA COR and technical training expert(s).

The evaluation plan should be designed in such a way as to allow refinement of the curriculum as-needed post-evaluation. The contractor shall evaluate the curriculum for its adherence to best practices of risk communication which shall be completed before the end of the project. In consultation with the WA COR, the Contractor shall provide follow up research, analysis and evaluation support to document, measure and help determine further strategic choices for the development of the risk communication training

curriculum.

**Deliverables and schedule under Task 4**

4. Revised agendas, lesson plans, and other course materials which will be delivered electronically. Within 15 days of the completion and delivery of Task 3 to WA COR.

**V. SCHEDULE FOR DELIVERABLES**

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR:

	DELIVERABLE	FORM/QUANTITY	SCHEDULE
<b>Task 1: Prepare Workplan</b>			
1a. Workplan	Workplan	Microsoft Word document	Within 15 calendar days of receipt of work assignment
1b. Revised Workplan	Revised workplan	Microsoft Word document	Within three calendar days of receipt of comments from the Contracting Officer, if required
<b>Task 2: Research</b>			
2a. Research	Research and analysis products based on WA COR consultations and priorities -	Electronic Documents	Within 30 days of revised work plana receipt by WA COR
2b. Research	Evaluation plan	Electronic Documents	Within 30 days of revised work plana receipt by WA COR
<b>Task 3: Materials Development</b>			

	DELIVERABLE	FORM/QUANTITY	SCHEDULE
3. Module development	Agendas, lesson plans, course materials and other outreach materials based on WA COR consultations and priorities.	Electronic Documents, Meetings	Within 30 days of the completion of Task 2.
<b>Task 4: Evaluation and Refinement</b>			
4. Curriculum refinement post evaluation	Revised agendas, lesson plans, and other course materials.	Electronic Documents	Within 15 days of the completion and delivery of Task 3 to WA COR.

## Work Assignment SOW

**Work Assignment Title: Permit Streamlining Analysis, Research and Best Practice Support**

**Contractor: Industrial Economics, Inc.**

**Contract No.: EP-W-15-011**

**Work Assignment Number:**

**4-66**

**Estimated Period of Performance:**

**Date of Issuance to 1/16/2021**

**Estimated Level of Effort:**

**869**

**Work Assignment COR (WA COR):**

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**Contract Level COR (CL COR):**

Cheryl R. Brown  
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### **I. Background**

EPA released its updated FY 2018-2022 Strategic Plan in September 2019. One of the Agency's ongoing objectives is to standardize and streamline processes to improve efficiency and quality to better meet mission goals and objectives. The Strategic Plan includes efforts to: become a more lean organization, using tools designed to identify and eliminate waste from processes while maximizing customer value; use evidence-based information to evaluate and address environmental problems; and support program efficiency and effectiveness to modernize our processes and systems across the Agency. Additionally, EPA is responsible for implementation of various efficiency, effectiveness and accountability statutory drivers, executive orders, and OMB memoranda (e.g. GPRA, FAST-41 Act, EO 13807, etc.).

In response to various statutory drivers, executive orders, and OMB memoranda EPA aims to develop and employ streamlining best practice and accountability strategies, tools

and practices to support EPA's program offices and regions, particularly with regard to environmental permitting which underpins major infrastructure projects. EPA is continually analyzing and assessing permit streamlining efforts with the goal of developing and employing best practices and better accountability for the agency's permitting. Building off previous and parallel permit streamlining/improvement efforts, EPA intends to put permit streamlining/improvement efforts into ongoing, regular practice by: collecting, evaluating and refining best practices and accountability metrics; developing best practices and accountability guidance, training and tools; and developing and using improvement accountability metrics and strategies to better achieve environmental outcomes the agency's permitting efforts. These efforts are increasingly important because EPA and states need to do more with fewer resources to support their environmental/public health missions.

## **II. Purpose**

The purpose of this work assignment is to provide support to OFA to develop and employ streamlining best practice and accountability strategies, tools and practices in support of EPA's program offices and regions, particularly with regard to environmental permitting. The work assignment provides support for the following:

- Research and analysis, surveys and other feedback strategies;
- Best practices and streamlining efficiency and effectiveness implementation;
- Tracking and management of permit related information;
- Evidence-driven decision-making through evaluation;
- Communication, education, publications, web support; and
- Development and presentation of training.

EPA is continually analyzing and assessing permit streamlining efforts with the goal of developing and employing best practices and better accountability for the Agency's permitting. Support efforts to achieve this effort may include, but not be limited to the following examples of work:

- Identifying, documenting/collecting the agency's best practices for permitting practices and permit streamlining, particularly those that can support major infrastructure projects;
- Providing permit streamlining practices and accountability research, analysis and evaluations for proof of use/value for broader use/implementation;
- Development of accountability practices and metrics for permit streamlining;
- Implementation of permit streamlining best practices and accountability strategies;
- Providing Lean/continuous improvement support through Kaizens, A3s and other tools and meeting/workshops to identify and map existing or baseline process/flow, identification of waste/problems and remedy analysis;
- Providing support to develop or enhance identified remedies of problem-solving, gap analysis, and other assessment and best practices efforts, including: training,

training materials, guidance, standardized forms, common templates, flowcharts, SOPs, common IT element solutions, fact sheets and other tools or products for the permit streamlining community;

- Providing support for ongoing communications, dialogue and meetings among the agency's program and regional offices, senior management and other federal agencies (e.g., meetings, presentation, briefing materials, fact sheets, etc.).
- Identifying new approaches and strategies for reducing redundancy and non-value-added activity in the permitting process;
- Assessing the potential value of new approaches in permitting for broader application, modified or enhanced standard operating procedures, guidance and/or policies; and
- Supporting an ongoing dialogue among Agency senior management to identify permit streamlining issues and build collaboration across the Agency.

### **III. Quality Assurance (QA) Requirements**

Check [ ] Yes or [ x ] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

### **IV. Tasks and Deliverables:**

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Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

#### **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline,

describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised Workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

## **Task 2 – Compilation of Permit Streamlining Best Practices and Accountability Approaches/Metrics and Tools [Contract Ref. -Element 1, Sections 1, 2.4, pages 4-6]**

The Contractor shall conduct research and examine permitting processes within EPA and its coregulating partners where streamlining best practices and accountability metrics currently exist or are being developed and/or implemented. The Contractor shall compile information on best practices in both the overall environmental permitting processes, as well as programmatic requirements for automation/IT system processes for permitting. The Contractor shall also research/assess the results of previous Lean and EPA Lean Management System process improvements (e.g., 5 permit Kaizens in FY18 and other A3 problem-solving activities) to identify common operational efficiencies (i.e. streamlining) for permitting and program effectiveness, including accountability systems and metrics.

The Contractor shall also conduct analysis, assessments or evaluations to determine existing gaps in permitting streamlining best practices to identify as yet-to-be potential best practices and accountability approaches and metrics. The Contractor shall compile recommendations, examples and strategies to document and help implement and support permitting streamline and accountability efforts for EPA and its coregulating partners. The Contractor shall also help support EPA in the research, identification and assessment of tools to support permit application process, such as spreadsheets, checklists, websites, databases, or other materials.

In consultation with the WA COR and program and regional offices, the Contractor shall provide the results of its preliminary research, analysis and recommendations for implementation/replication of permit streamlining best practices and accountability approaches to improve, replicate, enhance and fill gaps for needed best practices including: a) list of promising permit areas and processes to research for best practices and accountability analysis, potential best practice tools, and areas for further analysis; and b) in consultation with the WA COR, EPA programs and regional office, the Contractor shall develop a final (1 – 2 page) list of recommended best practices and accountability approaches (e.g., enhancements, replications, further education, codifying practices into SOPs/guidance, etc.), and the best method or tools for additional

development (e.g. standard forms, flow charts, trackers, electronic systems, etc.) and/or for further research (e.g., further evaluations, consultations with programs, A3s, Kaizen events, etc.). The Contractor shall also provide a proposed approach/timing for development/execution of the proposed best practices, tools and further research/analysis.

**Deliverables and schedule under Task 2 – Compilation/List of Permit Streamlining Best Practices and Accountability Approaches/Metrics and Tools –**

**2a. Within two weeks after consultation with the WA COR, the Contractor shall deliver a draft Master List of promising permit areas and processes to research.**

**2b. Within 3 weeks after consultation with the WA COR the Contractor shall deliver a final Master List of best practices, tools and further research areas and plan for development/ implementation.**

**Task 3 – Development and Implementation of Best Practices and Accountability Approaches/Metric and Tools**

**[Contract Ref. -Element 1 Section 2.6- 2.8, pages 7-8; Element 2, pages 8-9; Element 3, Sections 1-5, pages 10-13]**

The Contractor shall provide support to the Office of Policy on the development, testing and implementation of permit streamlining best practices and accountability approaches/metrics and tools. The development of these best practices and accountability approaches/metrics and tools will be based on recommendations and consultation with the WACOR and EPA program and regional permitting community developed in Task 2b. The Contractor shall work from the finalized list and plan of previously recommended best practices and accountability approaches/metrics and tools to implement and/or produce deliverables on the schedule(s) determined in consultation with OP and/or the program and regional offices. The Contractor will be working with multiple offices simultaneously and have a staggered schedule of deliverables based on the final list and ongoing consultation with EPA offices and the WA COR.

The Contractors shall be prepared to review, replicate, create and test best practices and accountability strategies for each of the major EPA program offices (OAR, OW, OLEM) as well as with the regional offices and coregulating partners, by extension. The Contractors shall be prepared to host meetings, discussions, and support small workgroups in the development, testing and implementation of best practices and accountability efforts for permit streamlining. The Contractor shall be prepared to develop recommended guidance(s) and process-oriented support documents and training(s). The Contractor shall also be prepared to develop, create and/or enhance identified tools to support permit application process, such as spreadsheets, checklists, websites, databases, or other materials. The Contractor shall plan for the following examples of possible efforts and products to be completed:

- 1-2 process reviews to develop new or enhanced best practices (e.g., within permitting application processes, reviewing transparency in permitting application



- status, etc.);
- Development/documentation of up to 10 best practices/accountability processes suitable for the following hardcopy and web publications;
  - Up to 5 case studies
  - Up to accomplishment 2 documents (e.g, 4-page “brochure,” and/or summary catalog of permitting successes)
  - Up to 5 fact sheets
  - Up to 2 guidance documents of approx. 20 pages
  - Up to 12 permit templates, checklists
  - Up to 10-15 graphics (e.g., work/application flowcharts, etc.)
  - Up to 2 miscellaneous program slide presentations (less than 15 pages);
- Website support for easy-to-use/access library for permitting documents;
- Develop and test accountability approaches, metric and tools for permit streamlining efforts (e.g., ensuring transparency, availability/access of permit work progress, and in event change of key personnel, etc.);
- Multiple meetings/consultations and testing/evaluation efforts with permitting program and/or regional offices;
- 1-3 deliveries and needed revisions to NEPA training for Best Practices;
- Consultation/coaching support of Lean expert(s) on up to 2 streamlining efforts (e.g., assessment of follow-thru on past permitting Kaizen events and/or 3-4 A3 problem-solving coaching efforts, etc.); and
- 1-2 travel trips (e.g., Boston-DC, Boston, Chicago).

#### **Deliverables and schedule under Task 3 - Best Practices and Accountability**

##### **Approaches/Metrics and Tools: Implementation and Products –**

**Within two weeks after consultation with the WA COR and thereafter, or according to the final Master List schedule, or as needed, established through technical direction from the WA COR.**

#### **Task 4 – Permitting Policy Division Outreach and Communications Support**

**[Contract Ref. -Element 1, Sections 2.1-2.3, pages 5-6]**

The Contractor shall assist, in consultation with the WA COR, with other program related Permitting Policy Division (PPD) outreach materials and communication support. These may include but are not limited to:

- 1-6 other PPD program communication support documents such as presentations, graphics, “dashboard” support and tracking documents (e.g., Major Infrastructure Project Tracker), web and print (1-10 pages max);
- In-person training support materials (e.g., graphics, posters, visual aids); and
- Other visual management deliverables based on consultation with WA COR

**Deliverables and schedule under Task 4 - Outreach and Communication Support – Materials/products delivered within 15 days of WA COR technical direction, or as otherwise stated in technical direction.**

## **V. Summary of Deliverables**

### **Task 1 - Workplan**

- 1a. Workplan within 15 calendar days of receipt of work assignment.**
- 1b. Revised workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

### **Task 2 - Compilation of Permit Streamlining Best Practices and Accountability/Metrics and Tools –**

**2a. Within two weeks after consultation with the WA COR, the Contractor shall deliver a draft Master List of promising permit areas and processes to research.**

**2b. Within 3 weeks after consultation with the WA COR, the Contractor shall deliver a final Master List of best practices, tools and further research areas and plan for development/ implementation.**

### **Task 3 - Best Practices and Accountability Approaches/Metric and Tools: Implementation and Products –**

**Within two weeks after consultation with the WA COR and thereafter, or according to the final Master List schedule, or as needed, established through technical direction from the WA COR.**

**Task 4 - Permitting Policy Division Outreach and Communications Support - Materials/products delivered within 15 days of WA COR technical direction, or as otherwise stated in technical direction.**

## **Work Assignment SOW**

**Work Assignment Title:** EPA Lean Management System Support and Lean Kaizen Event Facilitation and Training

**Contractor:** Industrial Economics, Inc.

**Contract No.:** EP-W-15-011

**Work Assignment Number:**

**4-67**

**Estimated Period of Performance:**

July 17, 2020 - January 16, 2021

**Estimated Level of Effort:**

1295 hours

**Work Assignment COR (WA COR):**

Stefan Martiyan  
OA/OCI (1708A)  
202-564-1987  
[Martiyan.stefan@epa.gov](mailto:Martiyan.stefan@epa.gov)

**Alternate Work Assignment COR:**

Andrew Cox  
OA/OC I(1708A)  
202-564-4398  
[Cox.andrew@epa.gov](mailto:Cox.andrew@epa.gov)

**Contract Level COR (CL COR):**

Cheryl R. Brown  
Office of Policy, Immediate Office (1805T)  
202-566-0940  
[brown.cheryl@epa.gov](mailto:brown.cheryl@epa.gov)

### **I. Background**

Since 2014, EPA has implemented an agency-wide Lean Government program. Lean is a set of principles and tools that help organizations eliminate waste of time, money, space, motion, etc. from their operations. Pioneered by Toyota, an estimated 70% of U.S. manufacturing firms report using Lean (Industry Week 2008). Lean Government refers to the application of these principles to eliminate waste in government administrative processes while preserving substantive goals. Successful use of Lean ensures that employees are optimizing the time they spend on substantive, value-added activities.

EPA is implementing a comprehensive Lean Management System that uses workflows, visual management, and standard work throughout the organization. One of the outcomes of the EPA Lean Management System (ELMS) is that problems in the workflow are identified and addressed before they worsen. Some of these problems require Lean facilitation to be solved, while others can be fixed by the individuals doing the work itself.

EPA currently has currently deployed ELMS to 60% of the agency with the goal of deploying this system to 80% of the agency by September 30, 2020. Deployment training includes eight hours of training for the work unit, with follow ups to evaluate progress. Deployment of the system involves each team utilizing this training through visual management, problem solving and focusing incrementally on improving one thing about their process. EPA also provides training on specific skills related to continuous process improvement such as problem solving, facilitation skills, leadership training and electronic visual management. EPA also has goals to increase employee idea implementation and to achieve 250 processes improved by September 30, 2022.

## **II. Purpose**

The purpose of this work assignment is to provide EPA offices with a range of activities and services in the implementation of ELMS. Specifically, the work assignment shall be used to support the facilitation of Lean process improvement events and the provision of deployment training and continuous process improvement training.

## **III. Quality Assurance (QA) Requirements**

Check ☐ Yes or ☒ No, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs shall provide additional information here, if **Yes** is checked above.

## **IV. Tasks and Deliverables:**

The WA COR shall review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

**The Contractor shall not duplicate any work previously performed under an EPA contract. The Contractor shall only proceed with technical direction from the WA COR, CL COR or CO.**

### **Task 1: Prepare Workplan**

The contractor shall prepare a workplan within 15 calendar days of receipt of a work assignment

signed by the Contracting Officer. The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO shall review the workplan. However, only the CO can approve/disapprove, suggest revisions, or change the workplan. Official revisions shall be given to the contractor by the CO. The contractor shall prepare a revised workplan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of the receipt of work assignment.**

**1b. Revised workplan within three calendar days of receipt of comments from the Contracting Officer, if required.**

**Task 2: EPA Lean Management System Support** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9]

**2a. Lean Event Facilitation for Agency Projects** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] The contractor shall provide expert facilitation of Lean process improvement events for agency projects as identified by the WA COR. Such events may take place at EPA headquarters, regional offices, field offices and virtually. Facilitation support shall include coordination with the event sponsor and EPA Office of Continuous Improvement (OCI), preparatory research and analysis as needed prior to the event, delivery of a properly scoped event, recording of event analyses and countermeasures, assistance to the project sponsor after the event to ensure successful implementation of the countermeasures identified in the Lean event, reporting, and other steps. These events shall be conducted using standard work processes and forms/templates to be provided to the contractor by EPA. EPA Lean experts may be present at these events.

**2b. Lean Event Standard Work Evaluation and Revision** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] The contractor shall participate in workshops in Washington, DC and virtually to evaluate and revise the standard work process associated with Lean process improvement events and associated forms/templates. These workshops are intended to modify and improve the standard work used in the first year of ELMS implementation based on the experiences and professional observations of the contractor during the first year. After the standard work is modified and established as final, the contractor shall not modify the standard work and associated forms/templates or their application in Lean process improvement events without written direction from the WA COR.

**2c. ELMS Deployment Training** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] The contractor shall provide ELMS deployment training for EPA offices and individual processes as identified by the WA COR. Deployment training shall take place at EPA headquarters, regional offices, field offices and virtually. The contractor shall use EPA's training materials and standard work to provide the training. Multi-process deployments may last as long

as five days on-site or virtually. Deployments for individual processes may last eight hours. The contractor may also provide training to prospective EPA trainers.

**2d. ELMS Just-in-time Training** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] The contractor shall provide training on specific elements of ELMS for EPA offices and individual work units as identified by the WA COR. Such training may include, but is not limited to, basic and advanced problem-solving, facilitation skills, and electronic visual management. Training may take place at EPA headquarters, regional offices, field offices and virtually. The contractor shall use EPA’s training materials and standard work to provide the training unless direction is given to supplement training materials by WA COR.

**2e. Leadership Training** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] In support of ELMS, contractor shall provide training on leadership skills, techniques and behaviors to various levels of EPA management. The contractor shall use EPA’s training materials and standard work to provide the training and shall supplement the training materials when directed by the WA COR. Training shall take place at EPA headquarters, regional offices, field offices and virtually.

**2f. Tracking and Reporting Support** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] In support of ELMS, the contractor shall provide support of tracking and reporting of projects and initiatives which support the Lean Management System. This includes, but is not limited to, data visualizations, tracking and reporting spreadsheets, electronic dashboards and user interface guidance development.

**2g. Preparation** [Contract Ref. Element 2 – Encourage Broad Scale Application of Business Process Improvement Tools and Organizational Excellence, Pages 8-9] The contractor shall provide a copy of *We Don’t Make Widgets* by Ken Miller (Governing Books, 2010) to any Lean facilitator tasked with facilitating an EPA Lean process improvement event and ensure that the facilitator has read the book prior to the event. The contractor shall ensure that any Lean facilitator tasked with facilitating an EPA Lean process improvement event has access to and is familiar with the standard work process and associated forms/templates discussed in the tasks above.

**Task 3: Communications and Reporting** [Contract Ref. Element 1 – Planning and Management Support]

**3a. Communications Materials Preparation** [Contract Ref. Element 1 – Planning and Management Support] The contractor shall produce short reports, video productions, and other communications materials as directed by the WA COR. The contractor shall prepare electronic versions of draft and final documents in PDF or other formats as appropriate. These materials shall pertain to individual Lean events and their outcomes, groups of Lean events and their outcomes, and/or the overall activities and result of EPA’s continuous improvement programs.

**Deliverables and Schedule**

The contractor shall provide the following specific deliverables to the EPA WA COR:

	DELIVERABLE	FORM/QUANTITY	SCHEDULE
<b>Task 1: Prepare Workplan</b>			
1a. Workplan	Workplan	Microsoft Word document	Within 15 calendar days of receipt of work assignment
1b. Revised Workplan	Revised workplan	Microsoft Word document	Within three calendar days of receipt of comments from the Contracting Officer, if required
<b>Task 2: EPA Lean Management System Support</b>			
2a. Lean Event Facilitation for Agency Projects	Facilitation of Lean process improvement events for agency priority areas and for EPA program and regional offices	In-person or virtual event facilitation	Per direction from WA COR
2b. Lean Event Standard Work Evaluation and Revision	Recommendations on standard work and accompanying forms and templates	In-person or virtual meeting participation and email	One meeting per year; additional recommendations as needed
2c. ELMS Deployment Training	Delivery of five-day training following EPA curriculum and training materials	In-person or virtual delivery of training	Per direction from WA COR
2d. ELMS Just-in-time Training	Delivery of partial-day focused training following EPA curriculum and training materials with support of additional leadership training materials, if required	In-person or virtual delivery of training	Per direction from WA COR

	DELIVERABLE	FORM/QUANTITY	SCHEDULE
2e. Leadership Training	Delivery of partial-day leadership training in support of ELMS following EPA curriculum and training materials with support of additional leadership training materials, if required	In-person or virtual delivery of training	Per direction from WA COR
2f. Tracking and Reporting Support	Delivery of tracking and reporting systems, reports, dashboards, if required	Electronic tracking and reporting system, Electronic tracking and reporting system updates, Requirements documentation, User interface guidance	Per direction from WA COR
2g. Preparation	Confirmation of facilitator preparation as described in Subtask 2g	E-mail	Five business days prior to the first Lean event conducted by each new Lean facilitator
<b>Task 3: Communications and Reporting</b>			
3a. Communications Materials Preparation	Short reports, data visualizations, captioned video and other communications materials	Documents – PDF, PowerPoint or other formats  Video – MPEG4, WMV or other formats	Per direction from WA COR. Revised draft documents or files shall be delivered to EPA within three business days of receipt of the revisions.



## **Work Assignment SOW**

<b>Work Assignment Title:</b>	Risk Communication Hands-On Training Sessions
<b>Contractor: Industrial Economics, Inc.</b>	<b>Contract No.:</b> EP-W-15-011
<b>Work Assignment Number:</b>	<b>WA 4-68</b>
<b>Estimated Period of Performance:</b>	<b>Date of Issuance to</b> 1/16/2021
<b>Estimated Level of Effort:</b>	890 hours
<b>Work Assignment COR (WA COR):</b>	Angela Hackel Office of Administrator/Office of Public Affairs 202-566-2977 hackel.angela@epa.gov
<b>Contract Level COR (CL COR):</b>	Cheryl R. Brown Office of Policy, Immediate Office (1805T) 202-566-0940 brown.cheryl@epa.gov

### **I. Background**

Good risk communication is critical to work across virtually all our offices and regions, because it is fundamental to the agency's mission to protect human health and the environment. In recent years, different parts of the agency have been using different procedures and practices to both implement risk communication and to train their staff to do so. This siloed approach has led at times to inconsistencies across the agency and at times to poor risk communications. Implementing a centrally managed, modern, scientifically-sound curriculum to train EPA staff who are frequent risk communicators across several regional offices in HQ will begin to build on the agency's ability to implement best risk communication practices across the wide-range of work the agency completes.

### **II. Purpose**

In order to prepare EPA staff with the best possible risk communication tools and practice in using them, the contractor shall implement a scientifically grounded risk communication training curriculum in three to five hands-on training sessions with a goal of training approximately 90-120 staff. EPA would prefer to do in-person training sessions hosted in EPA regional offices or at Headquarters. However, due to the current COVID-19 situation, some or all of the training sessions may have to be conducted online. The contractor shall include a scientifically rigorous plan for how these trainings can be evaluated independently for curriculum quality and training effectiveness.

### **III. Quality Assurance (QA) Requirements**

Check [ ] Yes or [ X ] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

The statement above is Not Applicable as the Contractor will not be developing environmental measurements or generating environmental data.

### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverable.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

#### **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

- 1a. Workplan within 15 calendar days of receipt of work assignment.**
- 1b. Revised workplan within \_\_ calendar days of receipt of comments from the Contracting Officer, if required.**

**Task 2 – Training Session Planning**  
**Element 1, Pages 5-6, para 1-2**

Using the risk communication training curriculum developed under Work Assignment 4-65, the Contractor shall plan for holding 3-5 online training sessions in the Fall of 2020. The training sessions should be developed and carried out by trainers and staff with a level of expertise and experience in science communication training similar to those who developed the curriculum. This work is to include program coordination, external trainer selection and preparation, and logistical support. The contractor should prepare to switch the training sessions to in-person if the current COVID-19 situation changes in late Summer early Fall.

Deliverables and schedule under Task 2

- 2a. List of online platform and possible locations (in case in-person training is possible), dates, external trainers, meeting materials, and coordination meetings with EPA: Information will be shared with COR and other staff involved with the project via virtual meeting.

**Task 3 – Session Completion - Element 1, Pages 5-6, para 1-2**

The Contractor shall host 4 online or in person training sessions in several COR selected EPA office locations. The Contractor shall train a minimum of 80 EPA selected staff across these trainings.

Deliverables and schedule under Task 3

- 3a. 4-6 Online or In-Person Trainings.

**Task 4 – Evaluation - Element 1, Page 6, para 2**

The Contractor shall analyze the success or failings of the 3-5 training sessions and shall present an evaluation report that will include metrics, lessons learned, and recommendations for revisions to any future sessions.

Deliverables and schedule under Task 3

- 3a. Evaluation Report to be shared electronically and presented via virtual or in-person meeting as location allows.

## V. SCHEDULE FOR DELIVERABLES

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR:

	DELIVERABLE	FORM/QUANTITY	SCHEDULE
<b>Task 1: Prepare Workplan</b>			
1a. Workplan	Workplan	Microsoft Word document	Within 15 calendar days of receipt of work assignment
1b. Revised Workplan	Revised workplan	Microsoft Word document	Within three calendar days of receipt of comments from the Contracting Officer, if required
<b>Task 2: Training Session Planning</b>			
2a. Program coordination, external trainer selection and prep	List of online platform and possible locations (in case in-person training is possible), dates, external trainers, meeting materials, and coordination meetings with EPA	Virtual meeting	Per direction from COR, beginning July or August 2020
<b>Task 3: Session Completion</b>			
3a. Risk Communication Training Sessions	3-5 Training Sessions	Online or in person training sessions in COR selected EPA locations with approximately 90-120 EPA Staff	Per direction from COR, no later than January 16, 2021
<b>Task 4: Evaluation</b>			
4a. Evaluation, metrics, and lessons learned	Recommended revisions for any future sessions	Electronic Documents/ Meeting	Per Direction from COR, no later than January 16, 2021

## Work Assignment SOW

**Work Assignment Title: Permit Streamlining Analysis, Research and Best Practice Support**

**Contractor: Industrial Economics, Inc.**

**Contract No.: EP-W-15-011**

**Work Assignment Number: 4-69**

**Estimated Period of Performance: February 5, 2021 to January 16, 2022**

**Estimated Level of Effort: \_\_\_\_\_ hours**

**Work Assignment COR (WA COR):** Scott Bowles  
Office of Policy, OFA (2203A)  
202-566-2208  
[bowles.scott@epa.gov](mailto:bowles.scott@epa.gov)

**Contract Level COR (CL COR):** Ronald R. Wiley  
Office of Policy, Immediate Office (1805T)  
202-566-2497  
[wiley.ronald@epa.gov](mailto:wiley.ronald@epa.gov)

### **I. Background**

EPA released its updated FY 2018-2022 Strategic Plan in September 2019. One of the Agency's ongoing objectives is to standardize and streamline processes to improve efficiency and quality to better meet mission goals and objectives. The Strategic Plan includes efforts to: become a more lean organization, using tools designed to identify and eliminate waste from processes while maximizing customer value; use evidence-based information to evaluate and address environmental problems; and support program efficiency and effectiveness to modernize our processes and systems across the Agency. Additionally, EPA is responsible for implementation of various efficiency, effectiveness and accountability statutory drivers, executive orders, and OMB memoranda (e.g. GPRA, FAST-41 Act, EO 13807, etc.).

In response to various statutory drivers, executive orders, and OMB memoranda EPA aims to develop and employ streamlining best practice and accountability strategies, tools and practices to support EPA's program offices and regions, particularly with regard to environmental permitting which underpins major infrastructure projects. EPA is continually analyzing and assessing permit streamlining efforts with the goal of developing and employing best practices and better accountability for the agency's permitting. Building off previous and parallel permit streamlining/improvement efforts, EPA intends to put permit streamlining/improvement efforts into ongoing, regular

practice by: collecting, evaluating and refining best practices and accountability metrics; developing best practices and accountability guidance, training and tools; and developing and using improvement accountability metrics and strategies to better achieve environmental outcomes the agency's permitting efforts. These efforts are increasingly important because EPA and states need to do more with fewer resources to support their environmental/public health missions.

## **II. Purpose**

The purpose of this work assignment is to provide support to the Office of Federal Activities (OFA) to develop and employ streamlining best practice and accountability strategies, tools and practices in support of EPA's program offices and regions, particularly with regard to environmental permitting. The work assignment provides support for the following:

- Research and analysis, surveys and other feedback strategies;
- Best practices and streamlining efficiency and effectiveness implementation;
- Tracking and management of permit related information;
- Evidence-driven decision-making through evaluation;
- Communication, education, publications, web support; and
- Development and presentation of training.

EPA is continually analyzing and assessing permit streamlining efforts with the goal of developing and employing best practices and better accountability for the Agency's permitting. Support efforts to achieve this effort may include, but not be limited to the following examples of work:

- Identifying, documenting/collecting the agency's best practices for permitting practices and permit streamlining, particularly those that can support major infrastructure projects;
- Providing permit streamlining practices and accountability research, analysis and evaluations for proof of use/value for broader use/implementation;
- Development of accountability practices and metrics for permit streamlining;
- Implementation of permit streamlining best practices and accountability strategies;
- Providing Lean/continuous improvement support through Kaizens, A3s and other tools and meeting/workshops to identify and map existing or baseline process/flow, identification of waste/problems and remedy analysis;
- Providing support to develop or enhance identified remedies of problem-solving, gap analysis, and other assessment and best practices efforts, including: training, training materials, guidance, standardized forms, common templates, flowcharts, SOPs, common IT element solutions, fact sheets and other tools or products for the permit streamlining community;
- Providing support for ongoing communications, dialogue and meetings among the agency's program and regional offices, senior management and other federal

- agencies (e.g., meetings, presentation, briefing materials, fact sheets, etc.).
- Identifying new approaches and strategies for reducing redundancy and non-value-added activity in the permitting process;
- Assessing the potential value of new approaches in permitting for broader application, modified or enhanced standard operating procedures, guidance and/or policies; and
- Supporting an ongoing dialogue among Agency senior management to identify permit streamlining issues and build collaboration across the Agency.

### **III. Quality Assurance (QA) Requirements**

Check [ ] Yes or [ x ] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverable.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

#### **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO

can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised Workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

## **Task 2 – Compilation of Permit Streamlining Best Practices and Accountability Approaches/Metrics and Tools [Contract Ref. -Element 1, Sections 1, 2.4, pages 4-6]**

The Contractor shall conduct research and examine permitting processes within EPA and its coregulating partners where streamlining best practices and accountability metrics currently exist or are being developed and/or implemented. The Contractor shall compile information on best practices in both the overall environmental permitting processes, as well as programmatic requirements for automation/IT system processes for permitting. The Contractor shall also research/assess the results of previous Lean and EPA Lean Management System process improvements (e.g., 5 permit Kaizens in FY18 and other A3 problem-solving activities) to identify common operational efficiencies (i.e. streamlining) for permitting and program effectiveness, including accountability systems and metrics.

The Contractor shall also conduct analysis, assessments or evaluations to determine existing gaps in permitting streamlining best practices to identify as yet-to-be potential best practices and accountability approaches and metrics. The Contractor shall compile recommendations, examples and strategies to document and help implement and support permitting streamline and accountability efforts for EPA and its coregulating partners. The Contractor shall also help support EPA in the research, identification and assessment of tools to support permit application process, such as spreadsheets, checklists, websites, databases, or other materials.

In consultation with the WA COR and program and regional offices, the Contractor shall provide the results of its preliminary research, analysis and recommendations for implementation/replication of permit streamlining best practices and accountability approaches to improve, replicate, enhance and fill gaps for needed best practices including: a) list of promising permit areas and processes to research for best practices and accountability analysis, potential best practice tools, and areas for further analysis; and b) in consultation with the WA COR, EPA programs and regional office, the Contractor shall develop a final (1 page) list of recommended best practices and accountability approaches (e.g., enhancements, replications, further education, codifying practices into SOPs/guidance, etc.), and the best method or tools for additional development (e.g. standard forms, flow charts, trackers, electronic systems, etc.) and/or for further research (e.g., further evaluations, consultations with programs, A3s, Kaizen events, etc.). The Contractor shall also provide a proposed approach/timing for development/execution of the proposed best practices, tools and further research/analysis.



**Deliverables and schedule under Task 2 – Compilation/List of Permit Streamlining Best Practices and Accountability Approaches/Metrics and Tools –**

**2a. Within two weeks after consultation with the WA COR, the Contractor shall deliver a draft Master List of promising permit areas and processes to research.**

**2b. Within 3 weeks after consultation with the WA COR the Contractor shall deliver a final Master List of best practices, tools and further research areas and plan for development/ implementation.**

**Task 3 – Development and Implementation of Best Practices and Accountability Approaches/Metric and Tools**

**[Contract Ref. -Element 1 Section 2.6- 2.8, pages 7-8; Element 2, pages 8-9; Element 3, Sections 1-5, pages 10-13]**

The Contractor shall provide support to the OFA on the development, testing and implementation of permit streamlining best practices and accountability approaches/metrics and tools. The development of these best practices and accountability approaches/metrics and tools will be based on recommendations and consultation with the WACOR and EPA program and regional permitting community developed in Task 2b. The Contractor shall work from the finalized list and plan of previously recommended best practices and accountability approaches/metrics and tools to implement and/or produce deliverables on the schedule(s) determined in consultation with OP and/or the program and regional offices. The Contractor will be working with multiple offices simultaneously and have a staggered schedule of deliverables based on the final list and ongoing consultation with EPA offices and the WA COR.

The Contractors shall be prepared to review, replicate, create and test best practices and accountability strategies for each of the major EPA program offices (OAR, OW, OLEM) as well as with the regional offices and coregulating partners, by extension. The Contractors shall be prepared to host meetings, discussions, and support small workgroups in the development, testing and implementation of best practices and accountability efforts for permit streamlining. The Contractor shall be prepared to develop recommended guidance(s) and process-oriented support documents and training(s). The Contractor shall also be prepared to develop, create and/or enhance identified tools to support permit application process, such as spreadsheets, checklists, websites, databases, or other materials. The Contractor shall plan for the following examples of possible efforts and products to be completed:

- 1-2 process reviews to develop new or enhanced best practices (e.g., within permitting application processes, reviewing transparency in permitting application status, etc.);
- Development/documentation of up to 5 best practices/accountability processes suitable for the following hardcopy and web publications;
  - Up to 2 accomplishment documents (e.g., 4-page “brochure,”

- and/or summary catalog of permitting successes)
- Up to 2 fact sheets
- Up to 1 guidance documents of approx. 20 pages
- Up to 3 permit templates, checklists
- Up to 5-10 graphics (e.g., work/application flowcharts, etc.);
- Website support for easy-to-use/access library for permitting documents;
- Develop and test accountability approaches, metric and tools for permit streamlining efforts (e.g., ensuring transparency, availability/access of permit work progress, and in event change of key personnel, etc.); and

**Deliverables and schedule under Task 3 - Best Practices and Accountability Approaches/Metrics and Tools: Implementation and Products – Within two weeks after consultation with the WA COR and thereafter, or according to the final Master List schedule, or as needed, established through technical direction from the WA COR.**

**Task 4 – Office of Federal Activities Outreach and Communications Support [Contract Ref. -Element 1, Sections 2.1-2.3, pages 5-6]**

The Contractor shall assist, in consultation with the WA COR, with other program related OFA outreach materials and communication support. These may include but are not limited to:

- 1-2 other OFA program communication support documents such as presentations, graphics, “dashboard” support and tracking documents (e.g., Major Infrastructure Project Tracker), web and print (1-10 pages max);
- In-person training support materials (e.g., graphics, posters, visual aids); and
- Other visual management deliverables based on consultation with WA COR

**Deliverables and schedule under Task 4 - Outreach and Communication Support – Materials/products delivered within 15 days of WA COR technical direction, or as otherwise stated in technical direction.**

**V. Summary of Deliverables**

**Task 1 - Workplan**

- 1a. Workplan within 15 calendar days of receipt of work assignment.**
- 1b. Revised workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

**Task 2 - Compilation of Permit Streamlining Best Practices and Accountability/Metrics and Tools –**

- 2a. Within two weeks after consultation with the WA COR, the Contractor shall deliver a draft Master List of promising permit areas and processes to research.**

**2b. Within 3 weeks after consultation with the WA COR, the Contractor shall deliver a final Master List of best practices, tools and further research areas and plan for development/ implementation.**

**Task 3 - Best Practices and Accountability Approaches/Metric and Tools:  
Implementation and Products –**

**Within two weeks after consultation with the WA COR and thereafter, or according to the final Master List schedule, or as needed, established through technical direction from the WA COR.**

**Task 4 – Office of Federal Activities Outreach and Communications Support -  
Materials/products delivered within 15 days of WA COR technical direction, or as otherwise stated in technical direction.**

## **Work Assignment SOW**

**Work Assignment Title:** Risk Communication Hands-On Training Sessions

**Contractor:** Industrial Economics, Inc. **Contract No.:** EP-W-15-011

**Work Assignment Number:** WA 4-70

**Estimated Period of Performance:** February 8, 2021 to July 16, 2021

**Estimated Level of Effort:** 1422 hours

**Work Assignment COR (WA COR):** Angela Hackel  
Office of Administrator/Office of Public Affairs  
202-566-2977  
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**Contract Level COR (CL COR):** Ronald Wiley  
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Wiley.Ronald@epa.gov

### **I. Background**

Good risk communication is critical to work across virtually all our offices and regions, because it is fundamental to the agency's mission to protect human health and the environment. In recent years, different parts of the agency have been using different procedures and practices to both implement risk communication and to train their staff to do so. This siloed approach has led at times to inconsistencies across the agency and at times to poor risk communications. Implementing a centrally managed, modern, scientifically-sound curriculum to train EPA staff who are frequent risk communicators across several regional offices in HQ will begin to build on the agency's ability to implement best risk communication practices across the wide-range of work the agency completes.

### **II. Purpose**

EPA is expanding its hand-on training sessions to more staff, in order to continue to prepare EPA staff with the best possible risk communication tools and practice in using them. The purpose of this work assignment is to implement a scientifically grounded risk communication training curriculum in six hands-on training sessions with a goal of training approximately 90-120 staff. EPA would prefer to do in-person training sessions hosted in EPA regional offices or at Headquarters. However, due to the current COVID-19 situation, all the training sessions may have to be conducted online. The initial trainings provided by the contractor have been incredibly well received and there is a continued need to train more staff who communicate risk as a regular part of their roles at EPA.

### **III. Quality Assurance (QA) Requirements**

Check ☐ Yes or ☒ NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental

data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

The statement above is Not Applicable as the Contractor will not be developing environmental measurements or generating environmental data.

#### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverable.

Contractor personnel shall always identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

##### **Task 1 – Prepare Workplan**

The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

##### **Task 2 – Training Session Planning (Element 1: Planning and Management Support-Development and Management of Training, pg. 4)**

Using the risk communication training curriculum developed under Work Assignment 4-65, the Contractor shall plan for holding 6-7 online training sessions between January and July 2021. The training sessions shall be developed and carried out by trainers and staff with a level of expertise and experience in science communication training similar to those who developed the curriculum. This work is to include program coordination, external trainer selection and preparation, and logistical support. The contractor should prepare to switch the training sessions to in-person if the current COVID-19 situation changes in Winter early Spring.

##### Deliverables and schedule under Task 2

2a. List of online platform and possible locations (in case in-person training is possible), dates, external trainers, meeting materials, and coordination meetings with EPA: Information shall be shared with COR and other staff involved with the project via virtual meeting.

##### **Task 3 – Session Completion (Element 1: Planning and Management Support-Development and Management of Training, pg. 4)**

The Contractor shall host 6 online or in person training sessions in several COR selected EPA office locations if the current COVID situation changes. The Contractor shall train a minimum of 90 EPA selected staff across these trainings.

Deliverables and schedule under Task 3

3a. 6 Online or In-Person Trainings.

**Task 4 – Evaluation, (Element 3 Support for Evidence-Driven Decision-Making through Evaluation and Program Efficiency, pg. 9)**

The Contractor shall analyze the success or failings of the 6 training sessions and shall present an evaluation report that will include metrics, lessons learned, and recommendations for revisions to any future sessions.

Deliverables and schedule under Task 3

3a. Evaluation Report to be shared electronically and presented via virtual or in-person meeting as location allows.

**Additional Instructions:**

In carrying out this work assignment, it is the responsibility of the contractor to protect data to which it has access. The contractor must adhere to the rules of behavior defined in the following agency guidance:

- EPA contractors having access to personal information (including Personally Identifiable Information or PII) shall respect the confidentiality of such information, and refrain from any conduct that would indicate a careless or negligent attitude toward such information.
- *Definition of PII: Any representation of information that permits the identity of an individual to whom the information applies to be reasonably inferred by either direct or indirect means. Further, PII is defined as information: (i) that directly identifies an individual (e.g., name, address, social security number or other identifying number or code, telephone number, email address, etc.) or (ii) by which an agency intends to identify specific individuals in conjunction with other data elements, i.e., indirect identification. (These data elements may include a combination of gender, race, birth date, geographic indicator, and other descriptors). Additionally, information permitting the physical or online contacting of a specific individual is the same as personally identifiable information. This information can be maintained in either paper, electronic or other media.*

When Employing Questionnaires or Surveys Under this Work Assignment: EPA is expected to maintain commitments to the confidentiality of survey responses once given. This commitment is expected to be adhered to on the part of all EPA employees, contractors, grantees and other persons authorized or entrusted with the data for this survey. A breach of confidentiality under this contract (including analysis and evaluation activities) would be considered a violation of evaluation ethics<sup>[1]</sup>.

- The contractor must safeguard confidentiality for individuals who are asked to respond to any questionnaire or survey under this work assignment. The contractor should assess and implement the appropriate means for doing so, including but not limited to the collection, storage and reporting of results to EPA and or other public forums, including peer reviewed journals.

<sup>[1]</sup> See: American Evaluation Association Guiding Principles For Evaluators (August 2018). “D2. Abide by

current professional ethics, standards, and regulations (including informed consent, confidentiality, and prevention of harm) pertaining to evaluation participants.”

## V. SCHEDULE FOR DELIVERABLES

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR:

	DELIVERABLE	FORM/QUANTITY	SCHEDULE
<b>Task 1: Prepare Workplan</b>			
1a. Workplan	Workplan	Microsoft Word document	Within 15 calendar days of receipt of work assignment
1b. Revised Workplan	Revised workplan	Microsoft Word document	Within three calendar days of receipt of comments from the Contracting Officer, if required
<b>Task 2: Training Session Planning</b>			
2a. Program coordination, external trainer selection and prep	Plan for: (1) developing an online platform or list of possible locations (in case in-person training is possible), (2) selecting dates, (3) choosing external trainers, (4) developing meeting materials, and (5) holding coordination meetings with EPA	Virtual meeting	Per direction from COR, beginning February 2021
<b>Task 3: Session Completion</b>			
3a. Risk Communication Training Sessions	6 Training Sessions	Online or in person training sessions in COR selected EPA locations with approximately 90-120 EPA Staff	Per direction from COR, no later than July 16, 2021
<b>Task 4: Evaluation</b>			

	<b>DELIVERABLE</b>	<b>FORM/QUANTITY</b>	<b>SCHEDULE</b>
4a. Evaluation, metrics, and lessons learned	Recommended revisions for any future sessions	Electronic Documents/ Meeting	Per Direction from COR, no later than July 16, 2021



## **Work Assignment SOW**

**Work Assignment Title:** National Environmental Policy Act (NEPA) Training

**Contractor:** Industrial Economics, Inc.

**Contract No.:** EP-W-15-011

**Work Assignment Number:** 4-72

**Estimated Period of Performance:**

**March 10, 2021 – 1/16/2022**

**Estimated Level of Effort:** 829 hours

**Work Assignment COR (WA COR):**

Marthea Rountree  
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**Contract Level COR (CL COR):**

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### **I. Background**

#### EPA's NEPA Review Authority

Section 309 of the Clean Air Act (CAA), as amended, requires the Environmental Protection Agency (EPA) to review and comment on the environmental impact of any matter relating to the duties and responsibilities granted pursuant to the National Environmental Policy Act (NEPA) for any major Federal action to which Section 102(2)(C) of NEPA applies. Such written comment must be made public at the conclusion of any such review. In the event that a proposed action is determined to be unsatisfactory from the standpoint of public health, welfare, or environmental quality, the determination will be published by EPA and the matter referred to the Council on Environmental Quality (CEQ).

#### NEPA Background

Established in 1969, NEPA is our basic national charter for the protection of the environment. It establishes policy, sets goals, and specifies the process for carrying out the policy. In part, NEPA states that all federal agencies shall “utilize a systematic, interdisciplinary approach which will ensure the integrated use of the natural and social sciences and the environmental design arts in planning and in decision-making which may have an impact on man’s environment.” As indicated above, EPA is required, under CAA Section 309, to review and comment on this process for each action requiring environmental impact statements (EISs).

CEQ’s NEPA implementing regulations, at 40 CFR 1500 – 1508, are binding on federal

agencies, and establish minimum general requirements that assure NEPA compliance. These CEQ regulations establish a multistage process that describes how an agency is to analyze and describe to the decision maker and the public any significant environmental impacts that could result from carrying out a proposed action.

CEQ regulations were originally promulgated in 1978. These regulations were recently updated. The new regulations became effective on September 14, 2020.

## **II. Purpose**

The Office of Federal Activities (OFA) has a strategic goal to ensure that training needs for EPA practitioners are identified and met. In order to meet this goal, there is a need to evaluate and apply current and emerging learning tools and methodologies to training that will:

- Provide continuous and just-in-time learning and refresher training;
- Provide instructional material that targets skill retention to a diverse staff of all levels;
- Provide courseware that meets the developmental and technical training needs for an expanding EPA NEPA workforce; and
- Reduce time and travel costs for attending classroom training.

OFA has traditionally presented its training using an in-person, instructor-led classroom format. The training has been presented at EPA Headquarters (HQ) and Regional offices. More recently, a pilot Virtual NEPA 101 training was developed and delivered utilizing Zoom for Government video communications platform and seasoned NEPA practitioners as instructors. The content of this training was based on the September 2020 regulations. The overall training event included:

- An EPA Planning team that included both HQ and Regional staff
- Course syllabus with learning objectives, targeted learning outcomes, expectations and commitment of students and supervisors, and grading rubric.
- A course duration of 16 hours
- Case studies, student interactive exercises, knowledge checks, and a graded post-course test to document student mastery of the material.
- EPA Regional instructors who incorporated their experiences as they presented the course material
- Course evaluation

In addition, EPA has implemented a new learning management system on the Department of Interior's FedTalent web-based learning management system to offer access to asynchronous training for various EPA programs and track completion of synchronous and asynchronous training for EPA employees. An ultimate goal for OFA is to develop a complete NEPA training program to address training needs for EPA CAA Section 309 reviewers and EPA NEPA practitioners at all levels. The NEPA training program will include various synchronous and asynchronous courses to address various topics. All courses will be designed to allow for regular updates based on changes in policies and/or regulations. Synchronous courses will be initially designed as "virtual" courses but with the potential to be modified in the future for "in person" delivery. All asynchronous courses will be compatible with FedTalent. Long term training

program, asynchronous courses, and more advanced courses for EPA's CAA Section 309 reviewers and targeted courses for EPA NEPA practitioners will be addressed in a future work assignment. This work assignment addresses updates and support for delivery of the Introductory Course for NEPA 309 Reviewers. The target audience for the course are new EPA employees in the process of becoming familiar with EPA's CAA Section 309 Review responsibilities and requirements and existing EPA employees attending as refresher training. The course should address and cover the learning objective related to NEPA and EPA's CAA Section 309 NEPA review process.

The purpose of this work assignment is to:

- Update and modify the current Introductory Course for NEPA 309 Reviewers course materials based on student surveys, instructor feedback, planning team feedback, and audit and reviewer by experienced instructional designers.
- Provide support for a 2<sup>nd</sup> virtual course delivery to 20 to 24 students targeted for delivery in March 2021 (exact dates to be determined)
- Update and modify course materials to refer back to the 1978 CEQ NEPA regulations in the event that CEQ determines to reinstate the 1978 CEQ NEPA regulations in place of the current 2020 CEQ NEPA Regulations. Based on CEQ's determinations, the course materials may need to be modified prior to the delivery of the 2<sup>nd</sup> virtual course or after delivery of the 2<sup>nd</sup> virtual course. The WA COR will provide necessary direction on when to initiate the timing of this action.

### **III. Quality Assurance (QA) Requirements**

Check [ ] Yes or [ **X** ] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above.

### **IV. Tasks and Deliverables:**

The WA COR and the individual designated by the WA COR will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by the WA COR. Final deliverable shall be in Microsoft Word and/or another appropriate electronic format requested for the deliverable.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

## **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

## **Task 2 -Update and modify the current course materials [Contract Ref. –Element 1 Section 2.2, page(s) 5-6]**

The Contractor shall provide qualified personnel and services to update and modify the current course materials. These materials are currently offered in an instruction led format presented via the Zoom for Government video communications platform. EPA NEPA practitioners will be used as instructors. The existing course material will be provided in its entirety. Consideration shall also be given to the student surveys, instructor feedback, the planning team feedback and instructional designer audit. Additional expectations may include:

- Conducting any research necessary to develop and revise the existing course;
- Designing and developing instructional approaches and/or strategies to meet training requirements;
- Conducting analysis of training requirements and media requirement;
- Developing appropriate training objectives and test methods and designs instructionally valid training materials;
- Developing flow diagrams and story boards;
- Designing instructionally sound lessons;
- Ensuring that graphics/illustrations are appropriate/applicable to content;
- Ensuring course materials are directly related to learning objectives and outcomes;
- Revising the existing course schedule to expand course to from 16 hours to 20 hours to allow for more student interaction and reflection on materials;
- Updating course syllabus as necessary for consistency with updated learning objectives, outcomes and material updates;
- Updating course test to ensure it is aligned with learning objectives, outcomes and material updates;
- Updating initial “technical check session” to allow for student interactions, ice-breakers, and testing of necessary technical and interactive breakout room exercise tools that will

- be utilized in the course;
- Interacting with the CO, WA COR and technical subject matter experts to ensure technical accuracy of instructional content; and,
- Developing completion certificates and course critique forms

The contents material is expected to include:

- Electronic student handouts such as a booklet and list of references and acronyms;
- Consolidation and index of background materials by module;
- Learning exercises for interactive learning and discussion that supports multiple learning styles;
- Test and exam questions

EPA's official logo or seal shall be used on any publications, presentations, products, or materials funded under this contract, to the extent practical.

### **Deliverables and schedule under Task 2**

2a. Within 3 weeks (unless otherwise directed) after consultation with the WA COR and/or an individual designated by the WA COR, the Contractor shall deliver a draft of the updated/revised course. For efficiency in review, the material developed shall be delivered Module by Module including the associated course exercises, test questions and background materials for initial reviews. Delivery of the proposed updated course schedule, course syllabus and learning objectives and outcomes for all modules shall be submitted with or before the first module is submitted for initial review. The pre-course technical session module will be submitted with the last module to ensure that the technical session covers all the tools that will be utilized within the course. A delivery schedule for each module shall be submitted in the workplan and agreed upon at the kickoff meeting.

The contractor may propose alternate or additional deliverables subject to OFA approval. All deliverables shall be delivered to OFA in both draft and final versions.

2b. Within 1 week after consultation with the WA COR and the individual designated by the WA COR, the Contractor shall deliver the final updated/revised course including syllabus, schedule, modules, exercises, background and supporting materials, and course test.

### **Task 3 - Provide support for a 2<sup>nd</sup> virtual course delivery to 20 to 24 students [Contract Ref. –Element 1 Section 2.2, page(s) 5-6]**

Upon completion of course materials, the Contractor shall provide support for a 2<sup>nd</sup> virtual course delivery to 20 to 24 students. The estimated delivery timeframe is March 2021. Support will include providing logistical support to schedule and register students, providing technical support to coordinate activities in Zoom for Government platform prior to and during the course, providing support as needed to supplement instructor team with facilitation of breakout sessions, tracking course progress to ensure that instructors stay on schedule and adequate breaks are provided to students, providing assistance with immediate follow-up actions at the end of each

day and the start of the next day of the course, and providing delivery of end of course test and course evaluation to students. The specific timeline will be provided by the WA COR and/or an individual designated by the WA COR after the completion of the course materials.

### **Deliverables and schedule under Task 3**

**3a.** Within 2 weeks after consultation with the WA COR and/or an individual designated by the WA COR, the Contractor shall assist OFA in the delivery of the revised course.

### **Task 4 –Revise Course Material Based on the Council on Environmental Quality (CEQ) Regulation**

**[Contract Ref. –Element 1 Section 2.2, page(s) 5-6]**

CEQ's NEPA implementing regulations were originally promulgated in 1978. These regulations were recently updated and became effective on September 14, 2020. Based on diverging visions and priorities regarding the environment, the incoming Administration may be considering reversing the 2020 CEQ regulations. The course shall reflect the version that the current Administration supports. As a result, the Contractor shall be prepared to modify course materials to refer back to the 1978 CEQ NEPA regulations under the following conditions.

- Potentially rescinded before March 2021 and adjust prior to 2<sup>nd</sup> course delivery
- Potentially rescinded after March 2021 and adjusted after 2<sup>nd</sup> course delivery.

### **Deliverables and schedule under Task 4**

**4a.** Within 3 weeks after consultation with the WA COR and/or an individual designated by the WA COR, the Contractor shall provide the draft course material based on direction provided for the appropriate version of the regulations to be used following the delivery of materials as outlined in Task 2

**4b.** Within 1 week after consultation with the WA COR and/or an individual designated by the WA COR, the Contractor shall deliver final updated/revised course following the delivery of materials as outlined in Task 2.

## **V. Summary of Deliverables**

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR and/or an individual designated by the WA COR

### **Task 1 - Workplan**

1a. Workplan within 15 calendar days of receipt of work assignment.

1b. Revised workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.

### **Task 2 - Update and modify the current course materials**

2a. Within 3 weeks after consultation with the WA COR, the Contractor shall deliver the draft revised course materials.

2b. Within 1 week after consultation with the WA COR, the Contractor shall deliver the final course materials.

**Task 3 - Provide support for a 2<sup>nd</sup> virtual course delivery to 20 students**

Within 2 weeks after consultation with the WA COR, the Contractor shall assist OFA in the delivery of course materials.

**Task 4 – Revise Course Material Based on the Council on Environmental Quality (CEQ) Regulation**

4a. Within 3 weeks after consultation with the WA COR and/or an individual designated by the WA COR, the Contractor shall provide the draft course material based on direction provided for the appropriate version of the regulations to be used.

4b. Within 1 week after consultation with the WA COR and/or an individual designated by the WA COR, the Contractor shall deliver final updated/revised course.

**Work Assignment  
Statement of Work (SOW)**

**Work Assignment Title: Environmental Justice Research, Analysis, Collaboration and Program Implementation Support**

**Contractor: Industrial Economics, Inc.**

**Contract No.: EP-W-15-011**

**Work Assignment Number: 4-73**

**Estimated Period of Performance:**

**Date of Issuance to 1/16/2022**

**Estimated Level of Effort: \_\_\_\_\_ hours**

**Work Assignment COR (WA COR):**

Scott Bowles  
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**Alternate Work Assignment  
COR (AWA COR):**

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**Contract Level COR (CL COR):**

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**I. Background**

Environmental justice (EJ) is the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income, with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. EPA's Office of Environmental Justice (OEJ) supports endeavors to ensure everyone enjoys the same degree of protection from environmental and health hazards, and equal access to the decision-making process to have a healthy environment in which to live, learn, and work.



Created in 1992, OEJ coordinates EPA's efforts to address the needs of vulnerable populations by decreasing environmental burdens, increasing environmental benefits, and working collaboratively to build healthy, sustainable communities. OEJ provides financial and technical assistance to communities working constructively and collaboratively to address environmental justice issues. OEJ also works with local, state, and federal governments; tribal governments; community organizations; business and industry; and academia, to establish partnerships seeking to achieve protection from environmental and health hazards for all people regardless of race, color, national origin, or income.

For over nearly 30 years, OEJ has worked to address the disproportionately adverse human health and environmental impacts in overburdened communities by integrating environmental justice considerations throughout the Agency. OEJ has created the program, policies, and activities to assist communities in building their capacity; to better engage federal agencies to help them understand environmental justice issues; to incorporate the voices of communities into agency decisions; and to provide tools and resources for promoting the principles of environmental justice.

OEJ supports EJ through a number of efforts and tools including: strategic planning; policies and guidance; education, science and mapping tools and resources; collaborative partnerships; training and workshops; and grant opportunities. OEJ will need contract support with these underpinning activities to assist in strategically moving EPA's EJ practice to the next level on three area priorities to:

1. Deepen environmental justice practice within EPA programs to improve the health and environment of overburdened communities;
2. Work with partners to expand positive impacts within overburdened communities; and
3. Demonstrate progress on significant national environmental justice challenges.

## **II. Purpose**

The purpose of this work assignment is to advance EPA's next generation EJ practices through research, analysis, collaboration and program implementation efforts via contract support. A variety of different OEJ-wide support activities, which may span project or location-specific work as well as national scale program efforts, are needed in the following program areas:

- Advancing equity and EJ practice within the Agency and among external stakeholders, including environmental protection activities which prioritize equity, and civil rights within the context of systemic racism;
- Capturing information (e.g., research, secondary data, etc.) to aid EPA's programs and regions with strategies for considering EJ in hazard identification, dose-response assessment, exposure assessment, and risk characterization;
- Support of sustainable collaboration and information for OEJ, the EJ Interagency

Council, Strategy Implementation Committee and EJ Interagency Workgroup, including analysis, research, measurement/results and document/report development (e.g., guidance/best practices, etc.);

- EJ grant/cooperative agreement program support including grant logistic/processing, facilitation of meetings, training, technical review assistance and analysis; and
- OEJ-wide collaboration, communication and education/outreach and training support (e.g., meeting, planning, facilitation, note taking, document and graphic production, and EJ education/training, etc.).

### **III. Quality Assurance (QA) Requirements**

Quality Assurance is an important component of EPA's work to ensure environmental information is appropriate for its intended use. This WA does not require the Contractor to collect or obtain field samples. The Contractor is also not required to collect, use, or disseminate any primary environmental data, nor shall the Contractor generate environmental data with models. This WA only requires the Contractor to utilize existing data. When completing work under this WA the Contractor shall identify, attach, and follow any internal standard operating procedures (SOPs) for existing environmental data management. If necessary, the Contractor will supplement these SOPs per the direction of the EPA WA-COR. If any of the tasks in this SOW require the Contractor to collect primary environmental data or generate environmental data with models, the Contractor shall develop and submit a quality assurance project plan per technical direction of the WA-COR.

### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other, appropriate electronic format requested for the deliverable.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

#### **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work

assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The Contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised Workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

**Task 2 – Compilation of EJ Research, Analysis, Collaboration and Metrics or Measurement Tools Support. [Contract Ref. -Element 1, Sections 1, Sections 2.2 - 2.8, pages 4-8]**

The Contractor shall conduct research, reviews, analysis and/or evaluation of EJ practices, challenges, guidances, laws and other authorities in relations to support of EJ issues and topic, both historic and for current conditions. The Contractor shall work across EPA, with other federal agencies, State and local partners, Tribes, EJ communities and other stakeholders to examine the spectrum of EJ information to support this Task's endeavors.

In consultation with the WA COR and EJ Project Lead (contact provided by the WA COR) and per issued Technical Direction, the Contractor shall provide the results of its research, reviews, analysis and/or evaluation of EJ practices, challenges, guidances, laws and other authorities in relations to support of EJ issues and topic. The Contractor shall consult with the WA COR and EJ Project Lead to provide findings, results, and recommendations for follow-on development, implementation and/or execution of resultant research, reviews, analysis, etc. The Contractors shall provide proposed approaches, timing and an outline for any Task #2 result or product for the further development, implementation and/or execution/deployment in Task #3. Activities under Task #2 include the following:

- Assistance with formulating and support of strategic priorities through thought partner engagement/discourse and performing support tasks to assist with producing guidance for evolving the practice of environmental protection, with special emphasis on the social context of scientific practice in environmental protection;
- Conducting gap analysis and barriers assessment of programmatic structures and organizational culture that influence decision-makers to pivot away from prioritizing environmental protection practices to target resources and improvement measures for vulnerable, environmentally overburdened, and economically distressed populations;

- Support the acquisition of data from risk assessors within EPA’s programs and regions about strategies for considering environmental justice (EJ) in hazard identification, dose-response assessment, exposure assessment, and risk characterization. The information generated through this effort will highlight baseline practices among the Agency’s risk assessors used to account for EJ (disproportionate exposures and health impacts) in risk assessments; identify tools and methods that are currently used to account for EJ in risk assessments; and describe data, tools, and methodological barriers and challenges to assess for and/or consider EJ in risk assessment;
- Provide evaluation support tools and reviews for EJ analysis including conducting technical review of analyses for disproportionate environmental and environmental health impacts (e.g., eval/review of data sources, studies, datasets and methodologies);
- Conduct and support analysis and research on a wide range of EJ topics to provide findings and a summary of information across EPA and OEJ programs (e.g., in support of EJ IAC, WHEJAC/NEJAC technical support for community concerns and issues in Superfund, brownfields, air and water, etc.) including; gathering data, reviewing recommendations and reports; summarizing, drafting and designing research papers and/or documents into “best practices” reports or guides (e.g., “Guide on Interorganizational Collaboration, etc.); and providing support in the development of various other EJ support research and analysis;
- Provide research, review and design support for OEJ resources and support materials (e.g., Finding Federal Assistance Guide, Federal Grant Writing, etc.); and
- Support collecting, analyzing feedback and/or options to measure results and quantify effectiveness of OEJ-developed materials and efforts.

**Deliverables and schedule under Task 2 – Compilation of EJ Research, Analysis, Collaboration and Measurement Tools Support –**

**2a. Within two weeks after receipt of Technical Direction/consultation with the WA COR, the Contractor shall deliver a workplan for execution and milestones for delivery directed research, review, analysis, collaboration and measurement support.**

**2b. Within 1 week of final delivery milestone for the execution and the Technical Direction milestone workplan, the Contractor shall have delivered all interim and final research, analysis, collaboration and measurement products to the WA COR and EJ Project Lead. Deliverables shall include research, analysis and finding products including:**

- Results of up to 5 gap analysis findings/summaries/ reports;
- Findings/summaries for up to 15 research efforts;
- Findings/executive summaries for up to 5 evaluation efforts;
- Develop and/or produce EJ information gathering, surveys, measurements and usage tools in support of EJ activities for deployment/implementation in Task #3.

**Task 3 – EJ Research, Analysis, Collaboration and Metric/Measurement Tools Implementation Support –  
[Contract Ref. -Element 1, Sections 1, Sections 2.2 - 2.8, pages 4-8]**

The Contractor shall provide support to OEJ on the development, testing and implementation of EJ research, analysis, collaboration and measurement tools underpinned and recommended product/deliverable, typically originating from Task #2. The development/execution of products, materials and/or efforts will be based on recommendations and consultation with the WACOR and OEJ Project Lead(s) in support of the EJ priorities outlined in this SOW. The Contractor shall work from either approved, ongoing workplans in Task #2 or additional Technical Direction from the WACOR to implement and/or produce deliverables on the schedule(s) determined in consultation with OEJ and/or the EJ Project Lead. The Contractor will be working with multiple EJ Project Leads in OEJ simultaneously and may have parallel and/or staggered schedule of deliverables based on ongoing consultation with OEJ/EJ Project Leads and the WACOR. The Contractor shall plan for the following examples of efforts and products to be completed:

- Delivery of up to 10 summary findings of research, recommendations from thought partners and other engagement/discourse sources which support of strategic EJ priorities;
- Provide technical assistance (e.g., training, education resources, etc.) to communities, as well as other interested stakeholders whose actions and/or governing authority impact or influence conditions in communities that may be comprised of overburdened and/or underserved populations;
- Develop and deliver training (up to 3 deliveries of between 2 hours to 1-day duration);
- Deliver facilitation efforts for up to 20 sessions on various EJ topics (e.g., addressing systemic racism including legacy components and current impacts, etc.);
- Implement recommendations, based on Task #2 gap analysis and barriers assessment that are prioritized environmental protection practices that target resources and improvement measures for vulnerable, environmentally overburdened, and economically distressed populations;
- Develop/produce Equity Spotlight case stories (up to 20) to highlight effective decision-making engagement between goods movement sector and proximate communities adversely affected by disproportionate impacts;
- Support implementation of Equity Resource Partnership campaign support (e.g., research, and up to 20 private/public support meetings and 5 workshops) to incentivize public and private entities to provide funding and associated resource support to communities in order to facilitate equitable, effective community/business stakeholder engagement which address impacts and improve

environmental health and quality of life for underserved and overburdened populations including near-port or airport communities;

- Provide processing support and technical review assistance for EJ grants (up to approximately 900 application reviews);
- Develop/produce surveys, interviews questions, a data collection platform/database(s) and survey reports (up to 2 surveys/reports);
- Support up to 10 outreach campaigns to EJ communities on priority EJ efforts (e.g., risk assessors, and other stakeholders);
- Assist in the development and design of up to 2 best practices guidances/reports (e.g., Guide on Interorganizational Collaborations, etc.);
- Develop/complete updates to resources and design materials recommended under Task #2;
- Provide follow-up reports/summaries and user feedback updates on OEJ products (up to 10 product/effort follow ups);
- Provide website and listserve support and updates as needed from Task #2 recommendations; and
- Develop and test accountability approaches, developing metrics/measurement tools to measure EJ products/project success.

**Deliverables and schedule under Task 3 - EJ Research, Analysis, Collaboration and Metric/Measurement Tools Implementation Support –**

**3a. Within two weeks after receipt of Technical Direction/consultation with the WA COR, the Contractor shall deliver a workplan for execution and milestones for delivery directed research, review, analysis, collaboration and measurement support.**

**3b. Within 1 week of final delivery milestone for the execution and the Technical Direction milestone workplan, the Contractor shall have delivered all interim and final research, analysis, collaboration and measurement products to the WA COR and EJ Project Lead. Deliverables shall include research, analysis and finding products including:**

- Production, final development or implementation of resultant efforts for up to 10 summary findings of research, recommendations for project/effort in Task #2;
- Development/delivery of up to 3 trainings of between 2 hours to 1-day duration;
- Development/production of up to 20 educational documents/resources, typically of no more than 10 pages;
- Delivery of facilitation efforts for up to 20 group/community sessions, including logistic and note taking support;
- Development/production up to 20 case stories (e.g., Equity Spotlight, etc.);
- Delivery of campaign support (e.g., presentation of results of research, promotion of findings/recommendations for up to 20 private/public support meetings and 5 workshops) for the Equity Resource Partnership campaign;
- Complete processing and technical review/scoring assistance for EJ grants (up to

- approximately 900 application reviews);
- Implementation/deployment of information gathering tools, surveys, interviews and data collection platform/database(s) to produce up to 5 survey reports and promotion of results/findings;
- Implementation of up to 10 outreach campaigns to priority EJ communities;
- Development/promotion of up to 2 best practices guidances/reports;
- Complete up to 10 review and updates/follow-up to Task#2 and Task #3 reports/ summaries and user feedback with updates for OEJ;
- Update of OEJ website and listserve for all current support activities; and
- Implementation of agreed upon accountability approaches and/ metrics/measurement tools which measure EJ products/project success.

## **V. Summary of Deliverables**

### **Task 1 - Workplan**

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.**

### **Deliverables and schedule under Task 2 – Compilation of EJ Research, Analysis, Collaboration and Metrics or Measurement Tools Support –**

**2a. Within two weeks after receipt of Technical Direction/consultation with the WA COR, the Contractor shall deliver a workplan for execution and milestones for delivery directed research, review, analysis, collaboration and measurement support.**

**2b. Within 1 week of final delivery milestone for the execution and the Technical Direction milestone workplan, the Contractor shall have delivered all interim and final research, analysis, collaboration and measurement products to the WA COR and EJ Project Lead. Deliverables shall include research, analysis and finding products including: (See detailed deliverables in Task #2).**

### **Deliverables and schedule under Task 3 - EJ Research, Analysis, Collaboration and Metric/Measurement Tools Implementation Support –**

**3a. Within two weeks after receipt of Technical Direction/consultation with the WA COR, the Contractor shall deliver a workplan for execution and milestones for delivery directed research, review, analysis, collaboration and measurement support.**

**3b. Within 1 week of final delivery milestone for the execution and the Technical Direction milestone workplan, the Contractor shall have delivered all interim and final research, analysis, collaboration and measurement products to the WA COR and EJ Project Lead. Deliverables shall include research, analysis and finding products including: (See detailed deliverables in Task #3).**



**Work Assignment  
Statement of Work (SOW)**

**Work Assignment Title: Environmental Justice Literature Reviews**

**Contractor: Industrial Economics, Inc.**

**Contract No.: EP-W-15-011**

**Work Assignment Number: 4-74**

**Estimated Period of Performance:**

**Date of Issuance to 1/16/22**

**Estimated Level of Effort: 560 hours**

**Work Assignment COR (WA COR):**

Shari Grossarth  
Office of Policy, ORPM (1803A)  
202-566-2242  
[grossarth.shari@epa.gov](mailto:grossarth.shari@epa.gov)

**Alternate Work Assignment COR  
(AWA COR):**

Mark Corrales  
Office of Policy, ORPM (1803A)  
202-564-7493  
[corrales.mark@epa.gov](mailto:corrales.mark@epa.gov)

**Contract Level COR (CL COR):**

Joseph Alustiza-Derocco  
Office of Policy, Immediate Office (1804A)  
202-566-0940  
[Alustiza-derocco.joseph@epa.gov](mailto:Alustiza-derocco.joseph@epa.gov)

**I. Background**

EPA's Office of Regulatory Policy and Management (ORPM), manages the regulatory development process for the Agency, providing support and guidance to EPA's program and regional offices as they develop regulations. ORPM provides policy and analytical advice and support to these offices, works to ensure compliance with key statutes and Executive Orders relating to regulatory process, and helps to promote analytical consistency and rigor across EPA's regulatory portfolio.

One priority area in which ORPM provides support to EPA's program and regional offices is environmental justice (EJ). Environmental justice (EJ) is the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income, with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. ORPM advises and supports EPA program and regional offices in integrating EJ analysis in the regulatory development process, including assisting with EJ analysis and providing tools and reports.



## **II. Purpose**

The purpose of this work assignment is to conduct literature reviews and develop summaries of key findings of known EJ concerns for specific chemicals, pollutants, regulated sectors, and/or areas of concern.

This work is being funded by the American Rescue Plan Act of 2021 (ARP). ARP funds may be used to address activities that identify and address disproportionate environmental or public health harms and risks in minority populations or low-income populations. As specified by the ARP, this work assignment shall only support work related to EPA activities under section 103(b) of the Clean Air Act (42 U.S.C. 7403(b)), section 1442 of the Safe Drinking Water Act (42 U.S.C. 300j-1), section 104(k)(7)(A) of the Comprehensive Environmental Response, Compensation, and Liability Act of 1980 (42 U.S.C. 9604(k)(7)(A)), and sections 791 through 797 of the Energy Policy Act of 2005 (42 U.S.C. 16131 through 16137).

## **III. Quality Assurance (QA) Requirements**

Quality Assurance is an important component of EPA's work to ensure environmental information is appropriate for its intended use. This WA does not require the contractor to collect or obtain field samples. The contractor is also not required to collect, use, or disseminate any primary environmental data, nor shall the contractor generate environmental data with models. This WA only requires the contractor to utilize existing data. When completing work under this WA the contractor shall identify, attach, and follow any internal standard operating procedures (SOPs) for existing environmental data management. If necessary, the contractor will supplement these SOPs per the direction of the EPA WA-COR. If any of the tasks in this SOW require the contractor to collect primary environmental data or generate environmental data with models, the contractor shall develop and submit a quality assurance project plan per technical direction of the WA-COR.

## **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverable.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

The Contractor shall not duplicate any work performed previously.

## **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised workplan within 3 calendar days of receipt of comments from the Contracting Officer, if required.**

## **Task 2 – Conduct Literature Searches and Summarize Key Findings [Element 1, Sections 1 and 2.6, pages 4 and 7]**

The contractor shall conduct up to 10 literature reviews of known EJ concerns for specific chemicals, pollutants, regulated sectors, or areas of concern, as directed by the WA COR, and compile key findings in up to 10 summary reports. Activities under Task 2 include the following.

**Kick-off Call.** The contractor shall have a kick-off discussion with the WA COR and designated EPA staff within one calendar week after receipt of the work assignment to clarify terms and expectations and set timeframes for the work effort.

**Literature Review Topics.** The WA COR and designated EPA staff shall discuss candidate literature review topics with the contractor at the kick-off discussion and in follow-on discussions, as needed. Candidate topics may be specific to certain chemicals or pollutants (e.g., what is known about EJ concerns related to NO<sub>x</sub>), regulated sectors (e.g., what are known EJ concerns related to proximity to coal-fired electric generating units), or other general areas of concern. The WA COR will determine which topics to proceed with by issuing technical direction (TD) to the contractor. The contractor shall conduct literature reviews for up to 10 topics.

**Literature Search and Screen.** After receiving TD from the WA COR to proceed with a literature search for a specific topic, the contractor shall determine, in consultation with the WA COR, what kinds of literature will be included or excluded from the literature search (e.g. peer reviewed literature, NGO reports), identify search sources, identify search and screening criteria (e.g., topics for keyword search, inclusion criteria), and conduct a literature search. The contractor shall document the search protocol. The contractor shall complete literature searches for up to 10 topics.

After conducting a literature search, the contractor shall screen the literature for relevance using identified criteria. At the literature screening stage, the contractor shall screen titles and abstracts but is not expected to read full documents. After screening the literature, the contractor shall prepare and submit a memo to the WA COR that lists titles and abstracts of relevant literature expected to be included in the literature review. The contractor shall also document the search and screening protocol used. The contractor shall submit to the WA COR the screened list of relevant literature and search protocol for each topic within two (2) calendar weeks after receipt of TD from the WA COR to proceed with each topic. The contractor shall screen literature for and prepare a screened list of relevant literature and search protocol for up to 10 topics. The WA COR will review the screened list of relevant literature and direct the contractor whether to proceed with literature review for each topic.

**Literature Review and Summary of Key Findings.** After the WA COR determines to proceed with a literature review for a topic, the contractor shall review the full text of the literature and summarize the key findings in a report. The contractor shall deliver a draft summary report to the WA COR within four (4) calendar weeks after the WA COR reviews each screened list of relevant literature and determines to proceed with a literature review for each topic. The contractor shall finalize the summary report within one (1) calendar week after receiving comments on draft(s) from the WA COR. The contractor shall complete up to 10 literature reviews and deliver up to 10 summary reports.

#### **Deliverables and schedule under Task 2**

- 2a. Kick-off meeting within one (1) calendar week of receipt of work assignment**
- 2b. Screened list of relevant literature within two (2) calendar weeks of receiving TD from WA COR**
- 2c. Draft summary of key findings within four (4) calendar weeks of receiving TD from WA COR**
- 2d. Final summary of key findings within one (1) calendar week after receiving comments on draft(s) from WA COR**

#### **V. SCHEDULE FOR DELIVERABLES**

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR:

<b>TASK</b>	<b>DELIVERABLE</b>	<b>FORM AND QUANTITY</b>	<b>SCHEDULE</b>
<b>Task 1:</b>	<b>1a. Work Plan</b>	Electronic document	Within <b>15</b> days of work assignment receipt.

<b>TASK</b>	<b>DELIVERABLE</b>	<b>FORM AND QUANTITY</b>	<b>SCHEDULE</b>
	<b>1b.</b> Revised Work Plan, if necessary	Electronic document	Within <b>3</b> days of receiving comments from CO.
<b>Task 2</b>	<b>2a.</b> Kick-off Meeting	Electronic documents	Within <b>1 week</b> of work assignment receipt.
	<b>2b.</b> Screened List of Relevant Literature	Electronic documents	Within <b>2 weeks</b> after receiving TD from WA COR.
	<b>2c.</b> Draft Summary of Key Findings	Electronic documents	Within <b>4 weeks</b> after receiving TD from WA COR.
	<b>2d.</b> Final Summary of Key Findings	Electronic documents	Within <b>1 week</b> after receipt of comments from WA COR.

## Work Assignment SOW

**Work Assignment Title:** Climate Adaptation – Updates, Workshop Support, and Training

**Contractor:** Industrial Economics, Inc.

**Contract No.:** EP-W-15-011

**Work Assignment Number:** 4-75

**Estimated Period of Performance:**

**Date of Issuance to** Jan 16, 2022

**Estimated Level of Effort:** 1163 hours

**Work Assignment COR (WA COR):**

Christopher Reed  
Smart Sectors Program  
202-566-0606  
reed.chris@epa.gov

**Contract Level COR (CL COR):**

### I. Background

Until now, EPA and its partners have been able to assume climate is relatively stable and future climate will mirror past climate. But the past is no longer a good predictor of the future. The climate is changing at an increasingly rapid rate. EPA and its partners must therefore anticipate and plan for (“adapt to”) future weather extremes and changes in climate.

### II. Purpose

The purpose of this work assignment is to advance priorities associated with EPA’s climate adaptation activities in support of *Executive Order 14008, Tackling the Climate Crisis at Home and Abroad*. This work will support EPA’s efforts to build the capacity of its staff in considering and incorporating the changing climate into their policies, programs, regulations, and operations. It is critical for EPA staff to understand and adapt to how the changing climate is anticipated to affect the work that they do. Work will also support climate adaptation capacity building of EPA partners including states, tribes and indigenous people, local governments, businesses, and communities as they anticipate, prepare for, adapt to, and recover from the increasing impacts of climate change. EPA’s Climate Adaptation Program’s long-term goal is to support climate adaptation with all 574 federally-recognized tribes and 40,000 communities in the nation.

Examples of work in this area may include:

- Research on recent climate science (e.g., National Climate Assessments)

- Web content development related to climate change adaptation (e.g., content targeting local government officials, businesses)
- Needs assessments related to climate change adaptation
- Development of on-line climate adaptation training for EPA staff and/or partners
- Communication materials related to climate adaptation
- Development of resource materials related to climate adaptation
- Identification and development of case studies and/or examples of climate change adaptation by states, tribes and indigenous people, local governments, businesses, and communities; including focus on overburdened or underserved communities.

All deliverables must be 508-compliant.

### **III. Quality Assurance (QA) Requirements**

Quality Assurance is an important component of EPA's work to ensure environmental information is appropriate for its intended use. This WA does not require the contractor to collect or obtain field samples. The contractor is also not required to collect, use, or disseminate any primary environmental data, nor shall the contractor generate environmental data with models. This WA only requires the contractor to utilize existing data. When completing work under this WA the contractor shall identify, attach, and follow any internal standard operating procedures (SOPs) for existing environmental data management. If necessary, the contractor will supplement these SOPs per the direction of the EPA WA-COR. If any of the tasks in this SOW require the contractor to collect primary environmental data or generate environmental data with models, the contractor shall develop and submit a quality assurance project plan per technical direction of the WA-COR.

### **IV. Tasks and Deliverables:**

The Work Assignment Contracting Officer Representative (WA COR) will review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the comments as specified by WA COR. Final deliverable shall be in Microsoft Word and/or other appropriate electronic format requested for the deliverable.

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The Contractor shall not duplicate any work performed previously.

#### **Task 1 - Prepare Workplan**

The contractor shall prepare a Work Plan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a

detailed cost estimate by task and a staffing plan.

The WA COR, CL COR and the CO will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the contractor by the CO. The contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

1a. Workplan within 15 calendar days of receipt of work assignment.

1b. Revised workplan within 7 calendar days of receipt of comments from the Contracting Officer, if required.

**Task 2 – Updating the Science in the EPA Climate Change Adaptation Resource Center (ARC-X). [Contract Ref. - Element 4: Support for Cross-EPA Implementation of the Agency Climate Change Adaptation Plan; pages 13 & 14]**

The current version of the ARC-X system relies on the science as reported in the 3<sup>rd</sup> National Climate Assessment (NCA3). The ARC-X system now needs to be updated to reflect that latest science as report in the 4<sup>th</sup> National Climate Assessment (NCA4). NCA4 was released in 2018.

The contractor shall review the ARC-X and identify scientific references (*e.g.*, citations) and statements based on the science reported in NCA3 (*e.g.*, statements such as “sea level is expected to rise by X feet”). The contractor shall then identify appropriate updated references and scientific information in NCA4. Specific areas of the ARC-X to review and update include: Implications of Climate Change; Library; and Underlying Science.

The Work product shall include:

- A complete list of all the outdated information (citations and scientific statements) identified in the current version of the ARC-X system.
- For each outdated citation, the contractor shall then provide an updated citation and URL for the new citation.
- For each outdated scientific statement, the contractor shall provide replacement language using information contained in NCA4 and a hyperlink to the section of NCA4 from which it was drawn.

**Deliverables and schedule under Task 2**

**2a.** A complete list of all the outdated information (citations and scientific statements) identified in the current version of the ARC-X system – Within 15 workdays after workplan submission or as established through technical direction from the WA COR.

**2b.** For each outdated citation, the contractor shall then provide an updated citation and URL for the new citation. - Within 10 workdays after approval of WA COR on Task 2a.

**2c.** For each outdated scientific statement, the contractor shall provide replacement language using information contained in NCA4 and a hyperlink to the section of NCA4 from which it was drawn. - Within 10 workdays after approval of WA COR on Task 2b.

**Task 3 - Review and update current EPA Climate Change Adaptation trainings [Contract Ref. - Element 4: Support for Cross-EPA Implementation of the Agency Climate Change Adaptation Plan; pages 13 & 14]**

The following two EPA adaptation trainings were developed prior to 2016.

- [EPA Climate Change Adaptation Introductory Training](#) (EPA University Course)
- [Local Government Climate Adaptation Training](#) (ARC-X)

The contractor shall review each of the two trainings and provide a written recommendation of content and hyperlinks needing updating or revision. Upon approval of the recommendation and technical direction, the contractor shall identify and recommend updated content and hyperlinks.

### **Deliverables and schedule under Task 3**

**3a.** The contractor shall review each of the two trainings and provide a written recommendation of content and hyperlinks needing updating or revision. – Within 15 workdays of workplan approval.

**3b.** Upon approval of the recommendation and technical direction, the contractor shall identify and recommend updated content and hyperlinks. – Within 15 workdays of Task 3a approval.

### **Task 4 - Advancing climate adaptation for businesses**

**[Contract Ref. - Element 4: Support for Cross-EPA Implementation of the Agency Climate Change Adaptation Plan; pages 13 & 14]**

EPA is planning to support a regional workshop examining climate change adaptation in the context of local community and business service interactions. The workshop is expected to focus on communities and businesses in the area encompassed by EPA Region 5.

To support this workshop, EPA seeks contractor support to (1) recommend business sectors, specific businesses, and/or trade associations to participate in the workshop, and (2) advise EPA and the university that will be hosting the workshop on agenda and workshop discussion topics and approaches. To successfully complete this task, the contractor shall identify and recommend an organization to undertake this task that has the experience and expertise such as the following: (1) connections to an existing network of businesses interested and knowledgeable of climate change and climate change adaptation; (2) experience working with government officials at the local-and/or state-level on climate change and climate change adaptation; and (3) experience bringing businesses and communities together to advance climate change strategies and adaptation.

Examples of organizations with such experience include: [Center for Climate and Energy Solutions](#) (C2ES), [Business for Social Responsibility](#) (BSR), [Environmental Defense Fund](#) (EDF), [World Resources Institute](#) (WRI).

This task will be further defined by technical directive, once initial workshop planning arrangements are completed (expected October/November 2021).

### **Expected deliverables and schedule under Task 4**

**4a.** Develop list of potential regional workshop participants - within 15 workdays of assignment receipt from WA COR.

**4b.** Develop workshop discussion and agenda recommendations – within 15 workdays of comment assignment receipt from WA COR.

**4c.** Develop supplemental workshop materials in consultation with EPA team, if required –



within 15 workdays of assignment receipt from WA COR.

**Task 5 - Climate Change Adaptation Training (on-line).**

**[Contract Ref. - Element 4: Support for Cross-EPA Implementation of the Agency Climate Change Adaptation Plan; pages 13 & 14]**

EPA is committed to integrating climate change adaptation into policies, programs, rules, financial instruments, and operations (including management of facilities and supply chains). Accordingly, EPA seeks to develop “role-specific” training for EPA staff (e.g., rule-writers; grants officers; contract officers; permit writers). The trainings will be modelled on the EPA Climate Change Adaptation Introductory Training but with additional content tailored for staff related to a specific role.

Trainings shall be developed using Adobe Captivate software and comply with EPA’s web policies and style guides.

The contractor shall work with the Task Order Manager and climate adaptation technical staff to develop the role-specific content. Initial trainings to be developed will focus on:

- Rule development
- Grant management

EPA expects up to 3 additional role-specific trainings to be developed, after successful development of the rule development and grant management trainings.

**Deliverables and schedule under Task 5**

- 5a.** Develop training outline in consultation with EPA team - Within 15 days of assignment receipt from WA COR.
- 5b.** Revise training outline based on EPA comments – within 7 days of comment submittal from WA COR.
- 5c.** Develop training in Captivate consistent with EPA standards (to be provided by WA COR), in consultation with EPA team – within 15 days of assignment receipt from WA COR.
- 5d.** Test and finalize training (e.g., fix any bugs) in training before submitting final training to WA COR- Within 5 workdays of WA COR required changes based on training developed in 5c.

**V. SCHEDULE FOR DELIVERABLES**

Upon receipt of work assignment, the contractor shall provide the following specific deliverables to the EPA WA-COR:

TASK	DELIVERABLE	FORM AND QUANTITY	SCHEDULE
<b>Task 1:</b>	<b>1a.</b> Work Plan	Word document	Within 15 days of work assignment receipt.
	<b>1b.</b> Revised Work Plan, if necessary	Word document	Within 7 days of receiving comments from CO.

<b>TASK</b>	<b>DELIVERABLE</b>	<b>FORM AND QUANTITY</b>	<b>SCHEDULE</b>
<b>Task 2</b>	<p><b>2a.</b> A complete list of all the outdated information</p> <p><b>2b.</b> Updated citation and URL for the new citation</p> <p><b>2c.</b> Replacement language and hyperlinks</p>	<p>2a. Word document</p> <p>2b. Word document</p> <p>2c. Word document</p>	<p>2a. Within 15 workdays after workplan submission</p> <p>2b. Within 10 workdays after WA COR approval of Task 2a.</p> <p>2c. Within 10 workdays after WA COR approval of Task 2b.</p>
<b>Task 3</b>	<p><b>3a.</b> Review each of the two trainings and provide a written recommendation of content and hyperlinks needing updating or revision.</p> <p><b>3b.</b> Identify and recommend updated content and hyperlinks.</p>	<p>3a. Word document</p> <p>3b. Word document</p>	<p>3a. Within 15 workdays of workplan approval.</p> <p>3b. Within 15 workdays of Task 3a approval.</p>
<b>Task 4</b>	<p>4.a Develop list of potential workshop participants from WA COR</p> <p>4b. Develop workshop recommendations</p> <p>4c. Develop supplemental workshop materials in consultation with EPA team, if required.</p>	<p>4a. Word document</p> <p>4b. Word document</p> <p>4c. Word document</p>	<p>4a. Within 15 workdays of assignment receipt</p> <p>4b. Within 15 workdays of comment submittal from WA COR</p> <p>4c. Within 15 workdays of assignment receipt from WA COR</p>

<b>TASK</b>	<b>DELIVERABLE</b>	<b>FORM AND QUANTITY</b>	<b>SCHEDULE</b>
<b>Task 5</b>	<b>5a.</b> Develop training outline in consultation with EPA team <b>5b.</b> Revise training outline based on EPA comments <b>5c.</b> Develop training in Captivate consistent with EPA standards <b>5d.</b> Test and finalize training	<b>5a.</b> Word document or Adobe Captivate.  <b>5b.</b> Word document or Adobe Captivate.  <b>5c.</b> Adobe Captivate.  <b>5d.</b> Adobe Captivate.	<b>5a.</b> Within 15 days of assignment receipt from WA COR.  <b>5b.</b> Within 7 days of comment submittal from WA COR.  <b>5c.</b> Within 15 days of assignment receipt from WA COR. <b>5d.</b> Within 5 workdays of WA COR required changes based on training developed in 5c.